DOCUMENT RESUME

ED 379 478 CE 068 302

AUTHOR	Hunt, Deirdre; And Others
TITLE	Training in the Food and Beverages Sector in Ireland. Report for the FORCE Programme. First Edition.
INSTITUTION	European Centre for the Development of Vocational Training, Berlin (Germany).
REPORT NO	ISBN-92-826-8316-8
PUB DATE	94
NOTE	43p.; For the report on United Kingdom, see CE 068 303. Cover title varies.
AVAILABLE FROM	UNIPUB, 4611-F Assembly Drive, Lanham, MD 20706-4391 (Catalogue No. HX-83-94-216-EN-C: 5.50 European Currency Units).
PUB TYPE	Reports - Research/Technical (143)
EDRS PRICE	MF01/PC02 Plus Postage.
DESCRIPTORS	Agricultural Education; Bakery Industry; Case Studies; *Continuing Education; Corporate Education; Dairy Farmers; Fisheries; Food; *Food Processing Occupations; Foreign Countries; *Labor Force Development; Meat Packing Industry; Postsecondary Education; Secondary Education; *Vocational Education
IDENTIFIERS	*Beverages; *Ireland

ABSTRACT

The food and beverage industry is of overwhelming strategic importance to the Irish economy. It is also one of the fastest changing sectors. Recent trends in this largely indigenous industry in recent years include the following: globalization, large and accelerating capital outlay, company consolidation, added value product, enhanced quality demand, rapid and continuous technological change, and increased overseas operations. As the industry changes, so does the skill profile of its work force. Human resource development (HRD) specialists in the food and beverage industry face a number of challenges: a continuous training requirement, higher entry-level knowledge base, customized approach to meet company needs, certification of in-house training, production of transferable skills, and public and private sector partnership role. Five case studies suggest that, in terms of their HRD policies and practices, Irish companies emerge as world-class players. The companies studied are energetic, creative, and determined in their approach to developing their personnel for present and future requirements. The following themes can be extracted from the case studies: enhanced emphasis on social communication skills for all levels, development of in-house consultative systems, training that is increasingly technologically driven, and need for locally delivered but nationally recognized training. Training needs to be globalized. (The research methodology is appended.) (YLB)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED 379 478

FORCE
FORMATION CONTINUE EN EUROPE
European Commission

IRELAND
REPORT

FOOD AND BEVERAGES SECTOR

IRL

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)
☐ This document has been reproduced as received from the person or organization originating it.
☐ Minor changes have been made to improve reproduction quality.
• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Drawn up by **Centre for sectoral studies University College, Cork,** coordinated by **Crege Management, University of Reading** and **CEDEFOP.**
TASK FORCE – Human Resources, Education, Training and Youth.

BEST COPY AVAILABLE

CE 068 302

FOOD AND BEVERAGES SECTOR

TRAINING IN THE FOOD AND BEVERAGES SECTOR IN IRELAND

REPORT FOR THE FORCE PROGRAMME

drawn up by
Deirdre Hunt
Michael O' Suilleabhain
Mary Ward
Centre for Sectoral Studies University College of Cork

July 1993

First edition, Berlin 1994
Published by:
CEDEFOP – European Centre for the Development of Vocational Training,
Jean Monnet House, Bundesallee 22, D-10717 Berlin
Fax 49-30 + 88 41 22 22
Tel. 49-30 + 88 41 20 · Telex 18 41 63 eucen d
The Centre was established by Regulation (EEC) No 337/75
of the Council of the European Communities

Cataloguing data can be found at the end of this publication.

Luxembourg: Office for Official Publications of the European Communities, 1994

ISBN 92-826-8316-8

© ECSC-EC-EAEC, Brussels • Luxembourg, 1994

Reproduction is authorized, except for commercial purposes, provided the source is acknowledged.

Printed in the United Kingdom

FORCE

Formation continue en Europe
Commission of the European Communities
TASK FORCE
Human Resources, Education, Training and Youth
Rue de la Loi, 200; B-1049 Bruxelles

THE IDEA FORCE

The future economic strength and the potential for social progress of the European Community depends on a consistent impovement in the competence and qualifications of its 132.000.000 labour force. Better continuing vocational training is one of the essential conditions for the success of the Single Market 1993.
The European Commission is determined to support and give fresh impetus to the efforts which companies throughout the Community are making to improve continuing training.
FORCE is the European Community's action programme for the development of continuing vocational training. It is focussed on companies, especially on small and medium-sized companies. It involves trainers and training bodies, employer and union representatives - everyone concerned with improving the competence of the labour force.

WHAT DOES FORCE OFFER?

FORCE promotes working partnerships in continuing training between companies, training bodies, public authorities and social partners.
These will include: supporting continuing training innovation through a European transnational network, an exchange programme, transnational and transfrontier pilot projects and projects concerned with the evolution of qualifications; assuring closer policy co-operation between Member States by evolving a common statistical means of analysing what is being done in terms of continuing training, through regular analysis of relevant contractual policy and collective agreements, and through enquiries into sectoral needs; supporting the establishment of regional consortia and transnational continuing training partnerships which specialise in transferring exemplary good practice to economically weak regions.

JOINING

You can take part in the FORCE network and apply for financial assistance to join its innovation and transfer exchanges and projects if you are:
a large, medium-sized or small company, a training body working with industry or commerce, an employer or trade union body, a training or human resource expert or manager.
Through FORCE you can help improve continuing training in your company, sector or local labour market. At the same time you can help to contribute to the improvement and availability of continuing training – and thus to shaping the European Community.

5

CEDEFOP

European Centre for the Development of Vocational Training
Jean Monnet House, Bundesallee 22, D-10717 Berlin

Institutional status

CEDEFOP is an autonomous body, independent of the departments of the Commission of the European Communities, but its task and activities are closely integrated with those of the Commission, to which the Centre contributes its technical and scientific expertise.

Working guidelines for the Centre are laid down by its Management Board, whose members represent the EC Commission (3), trade unions (12) employers' organizations (12) and governments (12). The Management Board decides on the Work Programme, draws up and approves budgets and adopts the Annual Report.

The members of the Management Board are appointed by the organizations they represent and remain in office for two years. The chairmanship of the Board changes each year.

Institutional tasks

• Information:
In the field of vocational training, information is one of the Centre's vital tasks. Its documentation service and a constantly updated bibliographical database receive information from a network of national correspondents, and the information is then made available to a very wide audience, in part via highly sophisticated computerized channels. Its carefully planned publishing policy also ensures that the Centre's voice is heard on major issues in the field of vocational training. It produces its own regular publications (»Vocational Training«, »CEDEFOP flash« and »CEDEFOP flash special«) and occasional publications such as research reports, monographs and manuals.

• Research:
CEDEFOP, as a centre for the promotion and coordination of research within the Community, provides support in the form of information, expertise and encouragement for the planning and implementation of vocational training initiatives in Member States. In so doing it serves as a focus for innovation.

Consultation:
CEDEFOP, as an organization supporting the Commission, has the task of promoting a concerted approach to vocational training problems. It takes every opportunity to promote and encourage training.

ACKNOWLEDGEMENTS

This study was carried out in the framework of the European Food and Beverages Industries, within the EC FORCE programme and conducted by a central team made up of:

Jim Burns and Richard King, Reading University – UK
Louis Mallet, CEJEE, Toulouse – France
Wilfried Kruse, SFS Dortmund
Maurizio Sorcioni, Fondation CENSIS – Rome

under the responsibility of François Delay, Crege Management and in close collaboration with Tina Bertzeletou, CEDEFOP.

The project team would like to thank the companies who gave access for research, and whose staff provided the information and help which enabled us to write the case studies. We very much appreciate the time and effort invested so generously.

We would also like to thank the employers' organizations and trade unions, and their representatives, who contributed to the research by making suggestions for case studies, attending meetings and commenting on the draft report.

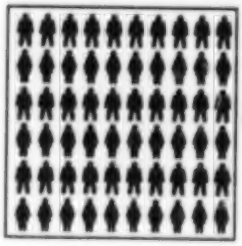
CONTENTS

PART 1 – SECTORAL CONTEXT	Page
1. Sectoral survey	11
1.1 The food and drink sectors in the Republic of Ireland	11
1.2 Ownership of firms	12
1.3 External trade links	12
1.4 Development of gross output in the food and drink sectors (1980–89)	12
1.5 The manufacturing/distribution interface	13
1.6 Technology	13
1.7 Employment environment	14
1.8 Training implications	16
2. Continuing vocational training	17
2.1 Continuing vocational training in Ireland	17
2.2 Enhancing good practice in continuing vocational training	17
2.3 Training delivery	18
2.4 Expenditure on training	19
2.5 The role of the social partners in decisions affecting employment and training	19
2.6 Developments in training in the food and beverage industry	19
2.7 Initial training in the food and beverage industry	19
2.8 Conclusion	20

PART 2 – CASE STUDIES	
1. Introduction	21
2. Participating companies	22
3. Avonmore Foods plc.	23
4. Guinness Dublin	26
5. Galtee Foods	28
6. Poldys Fresh Foods	30
7. Tawnagh Seafoods	32

PART 3 – TRENDS	
Main report findings	35
Conclusion	38
Appendix 1	39
Appendix 2	40

PART 1:



1. Sectoral survey

2. Continuing vocational training

BEST COPY AVAILABLE

1. SECTORAL SURVEY

Introduction:
The food and beverage industry is by far the most important component of the indigenous sector of Irish industry. Key characteristics of the sector include:

- a high percentage of Irish ownership
- significant profit retention within Ireland
- accounts for
  one-third of the output of all manufacturing industry in Ireland
  almost 30% of employment in Irish owned manufacturing firms and over 20% of manufacturing employment
  over 20% of Irish exports with total food exports exceeding food imports by a factor of almost 3 to 1.

The food and drink sectors are of exceptional importance in the Irish economy because they process predominantly home-grown materials produced by an extensive rural and maritime community. They provide an extensive degree of both direct and indirect employment in a country that is sparsely endowed with other natural resources.

The food and beverage industry includes all the activities of processing of agricultural products, fish and meat. These activities are coded within the NACE class 41/42, groups 411 to 428. In 1989, production in the food industry accounted for 8% of the whole of manufacturing within the EC. Turnover amounted to 346 billion ECU.

1.1 The food and drink sectors in the Republic of Ireland

The food industry

The food industry in Ireland accounts for one-third of the sales of Irish manufacturing industry and one-fifth of it's employment. Ten years ago, these shares accounted for 39% and 22% respectively. The food industry accounts for about 20% of Irish exports.

Within the food industry, the meat (NACE 412) and dairy (NACE 413) sectors together make up about 63% of the industry's total gross output. They also provide about half the employment in the food industry. The manufacture of bread, biscuits and flour confectionery (NACE 419) provides 18% of employment. The other activities in the NACE classification of food industries usually provide approximately 5-6% each or less of jobs overall. The average % of total sales for each of these activities is similarly low, indicating the overall dominance of the dairy and meat sectors in importance. In fact, in terms of share of gross output, meat and dairy products have maintained their relative importance since 1972.

This is also the case with cocoa, chocolate and sugar confectionery, while the relative importance of miscellaneous foodstuffs and fish processing improved over this period and the importance of bread, biscuits and flour along with sugar production and the production of grain and animal feed have declined.

In 1989 the food industry added just over 50% to the value of the materials it used. 90% of those materials were produced in Ireland, which contrasts sharply with a share of 53% for manufacturing industry as a whole. Thus, the indirect employment, that is, the work of the agricultural community, attributable to the food industry is likely to be a multiple of its direct employment effect. Overall value added as a percentage of gross output has risen from 19% in 1972 to 28% in 1989. Just over half of the output of the food industry was exported in 1989, according to the Census of Industrial Production data. It is acknowledged, however, that this indicator of the industry's importance in earning foreign exchange may not be accurate because of divergent interpretations on the part of Census respondents regarding sales into intervention stocks. If one compared trade and output data over a number of years, it is likely that a substantially higher degree of export orientation would result.

The drinks industry

In the drinks industry, distilling has become more important as regards share of output over this time, while the importance of brewing and malting has declined somewhat.

Because of confidentiality constraints, the Census of Industrial Production report in many cases combines the tobacco Industry (NACE 429) with the drinks industry (NACE 424-428). In the three points which now follow, we have no choice but to speak of the combined drink and tobacco industry (NACE 424-429), but let us note beforehand that in both 1989 and 1979, the drink industry's share of total employment in the drink and tobacco industry amounted to 77%.

Employment by establishments in the drinks industry fell in that ten-year interval from 7,866 to 5,073. Thus its current employment corresponds to about one-seventh of the employment in the food and beverage industry.

The drink and tobacco industry stands out from other industries because of its importance as a source of indirect tax revenue for the State. Thus, in 1988 the ratio of excise duty and other indirect taxes to total turnover (excluding VAT) was 40% in the drink and tobacco industry, in contrast to 0.3% in the food industry.

Over 70% of the materials used in the drink and tobacco industry are of Irish origin, drawn principally from the agricultural sector. In the case of one establishment, whose British parent company straddles both the food and drink industries, its very substantial output of alcohol, intended for use in Gilbey's gin, Smirnoff Vodka, and Bailey's Cream Liqueur, is derived from whey, a by-product of cheese production.

In fact, the vast majority of establishments in the Irish drink and tobacco industry are foreign-controlled. In 1989 about 77% of the employment and 81% of the output were accounted for by non-Irish companies. Output is destined for the home market to the extent of 83% and this domestic orientation has

clear implications for the size and composition of output.

The fish processing industry

In recent years there were about 113 firms involved in fish processing in Ireland, the vast majority of them being very small. Only six firms employ more than 100 persons each. While the industry has grown very rapidly during the 1980s, 35% of the Irish fish catch is still exported fresh, the remainder being processed on-shore. Relatively low priced pelagic fish, such as herring, mackerel, etc. currently account for 70% of all fish landings. The remainder are demersal fish (cod, whiting, plaice, sole etc.). A major weakness of the industry is the discontinuity of supplies, which hinders all-year-round processing. Industry sources suggest that slightly less than 60% of its workforce are employed on a full-time basis. The fishing industry accounts for 1.6% of employment in Ireland.

1.2 Ownership of firms

The past twenty years have witnessed both a relative and an absolute decline in Irish indigenous enterprises. By 1988 45% of output and over 55% of employment in all manufacturing industry was accounted for by foreign investments in Ireland. The food industry remains predominantly in Irish hands. Between 75% and 80% of both output and employment belong to Irish enterprises, many of them (especially in the dairy sector) owned to a large extent by agricultural co-operatives. It is important to emphasize that small Irish-owned firms have tended to neglect secondary processing and branding. Many of the indigenous firms that were traditionally involved in branding have been forced out of business due to an inability to compete, and typically it is either subsidiaries of multinationals or the large indigenous co-operatives which engage in branding. The past twenty years have also witnessed a dramatic institutional and technological transformation of these co-operative enterprises, with the scrapping of countless small establishments and their replacement by very large-scale plants built frequently on completely new sites.

The relatively large scale of operations in the food industry emerges clearly when we consider the proportion of establishments which (in 1988) displayed an output level (a) under £1 million, (b) £1m to £10m, and (c) £10m or more. For manufacturing industry as a whole these shares were 65% plus 27% plus 8%; for the food industry: 48%, 35% and 17%. Thus the share of establishment with an output of £10m or more was over twice as high in the food industry as it was in the entire manufacturing sector.

To indicate the relative size of enterprise rather than that of establishments, we look at the enterprise data published in the 1988 Census of Industrial Production. In manufacturing industry as a whole there were 1,591 enterprises; their average turnover was just over £10 million and their average employment was 100 persons. In the food industry we find 318 enterprises, an average turnover of £18 million and an average payroll of 115 persons. This refers to enterprises with 20 or more persons engaged, while the establishment data refer to plants with as few as 3 employees.

In 1989 the 30 enterprises in the drink and tobacco industry employed an average of about 250 persons each. Focusing on the drink and tobacco establishments, we note that the 15 largest establishments, who together accounted for 77% of the combined industry's workforce, displayed an average employment of nearly 350 persons each. By contrast, the largest 100 establishments in the food industry (that is, those employing 100 or more persons) employed an average of 215 persons each. Hence, one can speak of a relatively large scale of operations in the highly concentrated drink and tobacco industry in Ireland.

1.3 External trade links

The UK continues to be a highly important market for our food exports. Figures from the 1989 Census of Industrial Production reflect this. The UK receives 32% of our food exports overall, followed by other EC countries taking 28% in total between them. The next-largest individual market is the United States with 5%, and other countries combined take the remaining 35%.

Broken down into the various subcategories, 43% of meat exports go to the UK, 33% go to other EC countries and the remainder to other countries. 24% of dairy exports go to the UK and 60% to other EC countries, the remaining 16% going to non-EC countries. The UK market absorbs 90% of the milling industry's exports, 86% of the bread, biscuits & flour confectionery industry's exports, and 78% of the chocolate and sugar confectionery industry's exports. The UK also accounts for 20% of exports of miscellaneous foodstuffs, with 41% going to other countries. Finally, 33% of drink and tobacco exports go to the UK, 29% to other EC countries, 25% to the United States and the remainder to other non-EC countries.

1.4 Development of gross output in the food and drink sectors (1980–89)

With regard to the real output change displayed by the 14 industries/sub-sectors of the food and drink sectors in the period 1980–89, the gross output in 1989 was deflated by the Consumer Price Index (1980 = 100), which in that year took on a value of 203.

At the aggregate level, deflated gross output in the food sector rose by only 9 per cent, while that in the drink sector increased by 21 per cent. Within the former sector, the most conspicuous advance was recorded by the 'Miscellaneous' sub-sector NACE 417, 418, and 423. By far the largest individual product associated with this sub-sector is flavouring essences and concentrates. Sources familiar with the latter products suggest that the output value reflects the use of transfer prices in the export of concentrates for certain brands of U.S. soft drinks. Some convenience foods such as potato crisps and instant coffee are also encountered in the product list of this sub-sector. The second most conspicuous increase was recorded by NACE 415, processing and preservation of edible fish and other sea food, where a real growth of 53 per cent emerged. In the

output of dairy products (NACE 413) a relatively smaller growth of 21 per cent was noted. Turning to the drink sector, we observe a stagnant level of output in the main industry, brewing and malting (NACE 427) contrasting with a substantial rise of 95 percent in the output of the distilling industry (NACE 424).

We turn now to the negative output changes. Losses of roughly between 20 and 50 per cent were recorded by the related industries of NACE 422 (animal and poultry foods), 416 (grain milling) and 419 (bread, biscuit and flour confectionery). A similar fate befell the sugar industry (NACE 420), which posted a loss of 33 percent and the cocoa, chocolate and sugar confectionery industry (NACE 421), whose output fell by just under 10 percent. Here we note the juxtaposition within the food sector of upstream (e.g. grain and sugar) and downstream (e.g. bread, sugar confectionery) activities.

In contrast to the rise in the output of dairy products, there was a drop of roughly 45 per cent in the output of vegetable and animal oils and fats (NACE 411). The beef industry (NACE 412, slaughter, preparation and processing of meat), which, in 1980, accounted for nearly one-third of the output of the food sector as a whole, effectively stagnated between 1980 and 1988 – displaying an output drop of just 8 per cent. In doing so it stood out as generally representative of both the food and drink sectors, whose combined output rose by roughly 12 per cent in real terms between 1980 and 1989.

1.5 The manufacturing/distribution interface in Ireland

The levels of concentration in the food retailing industry in Ireland are as follows: Dunnes Stores & Quinnsworth/Crazy Prices hold almost half the market between them. Superquinn have a significant market share in Dublin but nowhere else. The symbol groups (Supervalu, Mace and so on) hold over a quarter of the market and other independent retailers make up approximately 30%. This structure resulted from the need on the part of small independent retailers to enter symbol groups to combat ongoing losses in market share to the multiples.

From a situation where the multiples were steadily gaining market share at the expense of small retailers, these losses have been pulled back due to the increased purchasing and promotional power now enjoyed by such groups. Occasional price wars between the multiples usually result in short-term changes in market share but do not seem to affect the long-term situation.

As to the identity of the main producers, the five large dairy co-ops (Dairygold, Waterford, Kerry, Golden Vale & Avonmore) dominate the dairy products category. Additional firms involved in high levels of value added meat processing (several of the aforementioned companies are active in this area) are relatively small in size. Firms involved in other consumer food production categories are often subsidiaries of such international firms as Masterfoods International or Cadbury's, to name two examples.

In relation to quality requirements, retailers, particularly the multiples, have their own requirements and these can be particularly stringent, but as yet they do not exclude suppliers on the basis of not having quality standards such as the ISO 9000. In the case of some food categories such as meat or dairy products the multiples do carry out plant inspections to ascertain that required quality standards can be reached. It is important to emphasize that the achievement of the ISO 9000 will always put the supplier in a favourable position with the food retailers.

Pricing policies continue to be a source of controversy for the multiples. Some food suppliers to one multiple retailer in particular have often protested that below-cost selling by that multiple has meant pressure on them to provide supplies at a cost which will permit the retailer's losses to be minimized, but reduce the suppliers' margins to levels which threaten their survival. No incidents of this nature have occurred recently but it is an example of the kind of pressure the retailer in question was prepared to exert on its suppliers.

In relation to other issues, the multiples have a practice of expecting suppliers to fund direct profitability studies to assess the profitability of products. Co-operation on this issue is vital in terms of gaining shelf space. Smaller food companies have occasionally denounced this practice as exploitative. Friction between large suppliers and the multiples has occurred on occasions also, with a refusal in one case to supply own-brand products resulting in temporary removal of that company's branded products from the shelves of the retailer concerned.

It is important to emphasize at this point that while disputes such as those described above arise from time to time they are not common. Food retailers in Ireland are highly professional in their activities and relations between them and their suppliers reflect this.

1.6 Technology

Existing technological capacity of indigenous firms and general information on the importance of technology in the food and drink industries

In general, the level of investment in technology, research and development and marketing required to remain competitive explains the tendency towards concentration across the European food and drink industry. Larger corporations enjoy significant cost advantages. Economies of scale are particularly important in certain food processes including the manufacture of sugar, dairy products, vegetable and animal fat production, the production of flour, fruit and vegetable processing, and the production of beer. Considerable cost savings can be achieved through an increase in the level of production in all of these activities, and consequently the large Irish dairy co-ops have made strenuous efforts to rationalize in this way, by a series of mergers and acquisitions and development of large-scale production facilities. Increased

rationalization, automation of production, contracting out of services and availing of economies of scale means overall job numbers have decreased but those left are more competitive.

This is also true of the beef industry. Overall, as regards technology within the beef industry plants are reasonably modern and well equipped to serve their respective markets. Despite some significant advances in recent times, however, sizeable proportions of Irish beef production is geared to a relatively low technology end of the market.

Automation in the *food* industry is already well advanced. Process control has become more sophisticated and centralized. Among the aspects of production now highly automated are

- Testing procedures for raw materials hygiene.
- Quality control.
- Payment to suppliers.
- Final product quality assurance.

Other aspects of production undergoing rapidly increasing automation are packaging, warehousing and distribution, with inherent implications for improved productivity.

A major issue with huge implications for technology and training is the move towards acquiring internationally recognized quality marks across the food industry. By adopting such systems for managing quality, companies can reduce the amount of substandard product produced, have far greater assurance as to the safety of their products, and have a competitive edge in the market place, as retail and wholesale buyers do prefer to do business with firms registered under such impartial and internationally recognized assessment of their quality systems.

The use of biotechnology represents another important measure of the use of technology in the food industry. Biotechnology holds particular promise for the food industry world-wide because it allows for the creation of products highly differentiated from existing ones. This area of technology does hold some potential for the food industry in Ireland, for example in the area of cheese production, where the use of biotechnology has resulted in new opportunities in cheese manufacture e.g. use of starter organisms developed by genetic engineering to isolate the most appropriate properties of individual cheeses.

In general, the use of high technology throughout the *alcoholic beverages industry* is helping companies to keep their production levels high, maintain competitiveness and enhance quality control. In the beer and spirits industries there is a high level of technology in use, as the industry is at the early mature stage of its product life cycle, The rate of change in technology is not very high and generally companies can adapt well to change. Soft drinks production is characterized by low technology and is highly labour intensive.

Brewing technology is a complex manufacturing process, with careful control necessary at every stage, thereby ensuring consistency and quality. Use of microprocessors in on-line, off-line handling of materials and brewing in cleaning and bottling processes is now the norm rather than the exception. Generally, the use of computers in many areas of the food industry is just beginning, but is expected to grow rapidly with increased availability and lower costs of suitable, small-scale systems. 54% of food companies already use computers for micro-based process control (1990 figures), so the use of such technology is strongly established.

One issue of significance in terms of the ability of all Irish firms to invest in new technology concerns the size of the domestic market. Its small size does not justify heavy investment in facilities or new technology based on this market alone. Only an exporting orientation would justify ongoing investment in technology with a view to competing successfully in global markets.

1.7 Employment environment

Firstly, let us note briefly the composition of the sector in terms of employment. Of the total 36,500 persons in food enterprises in 1988, some 10,000 were in the dairy industry (NACE 413), 9,000 in the meat industry (NACE 412), and roughly 5,000 each in NACE 419 and NACE 420-421 respectively. NACE 419 comprises bread, biscuits and flour confectionery, while NACE 420-421 cover sugar, chocolate, cocoa and sugar confectionery. In what now follows, we shall restrict ourselves at first to NACE 413 and 412, which together account for over half of the employment in the food industry, before going on to the drinks industry.

The dairy industry

This industry has consisted of 55-60 enterprises for the past ten years. Average employment per enterprise is currently about 185 persons. Industrial workers comprise about 75% of the workforce; male workers nearly 85% of the workforce in these enterprises.

The latter percentage shares remain essentially unchanged when we switch our focus to establish ment data, although the number engaged (about 8,200 as against 10,200) is substantially lower. The main components of the industrial workers' group are a. operatives 93% b. supervisors 5% c. apprentices 2%. Of the other employees, nearly two-thirds were in the administrative and technical category, the remaining one-third falling into the clerical category.

The meat industry

The turnover of enterprises in both the dairy and meat industries excludes subsidies from state funds or from the EC. Going back 10 years shows us that labour costs were in excess of the reported gross value added.

In the intervening period in the meat industry, labour costs have, on average, absorbed nearly 90% of gross value added. This reliance on support from export subsidisation and other schemes for consumer-distant, commodity production, with a

very low level of value-adding, tends to be associated with a low level of further training needs. The only redeeming feature lies in the addition, over the past ten years, of 20 enterprises to the 75 which existed in 1979. These predominantly small, specialized, downstream firms are generally characterized by a greater capability for value-adding than their bigger, longer-established counterparts.

The meat industry is characterized by a greater reliance on industrial workers than the dairy industry, that is, 87% as against 75%. Expressed differently, only 7% of the meat industry's workforce is engaged in administrative and technical duties, compared to 17% in the dairy industry. Among the industrial workers the gender composition shows the same proportions in reverse, that is, 17% females in the meat industry's and 7% in the dairy industry's industrial workers' category. The pigmeat and poultry enterprises are presumably those with the highest proportion of female workers in the meat industry.

The brewing and malting industry

While the number of establishments (20) has remained unchanged during the past decade, the workforce has been reduced by 36%, viz. from about 4,700 to roughly 3,000. A decade ago 44% of net output was absorbed by wages and salaries; now the share is just 28%.

The workforce is male-dominated to the extent of 87%. The numbers engaged in administrative and technical duties have fallen more rapidly than the industry's workforce as a whole; the 1978 share of 20% had fallen to 15% by 1988.

The fishing processing industry

Employment in this sector is 1,700 wholetime and 1,330 part-time workers. Most of the firms are rather small, 90 employ 20 people or less, 17 have between 20 and 100 employees, while only 6 have over 100 employees. The greatest concentration of employment is in the west and north west regions. Many areas along the western seaboard are now thriving regions, due entirely to income from fishing.

Workers' earnings

Focusing now on the earnings of industrial employees only, we can report that in manufacturing industry as a whole in the period 1980-1988, the hourly earnings of women were consistently just over two-thirds that of men. To be precise, the ratio was 68%. In the food sector, the ratio, while being equally stable, stood at the higher level of 78%. In the drink sector, on the other hand, the relativity of female to male earnings, while initially above the overall average of 68%, declined after 1985 and by 1988 it stood at the much lower level of 58%.

Overall trends in employment

The reasons for the overall decline in employment in the food and drink industries have been outlined elsewhere. To summarize – the only area to show significant growth over the period was miscellaneous foodstuffs (NACE 417, 418, 423). Decline in the other areas is due chiefly to mechanization and subcontracting. The growth of subcontracting means that the overall number of people employed in food-related activities has declined less than the figures below indicate – once workers are employed by a contractor rather than a food company they are counted as service rather than food industry workers for census purposes. The following is a discussion of individual trends.

Employment in the *meat industry* has fallen from 11,426 in 1980 to 9,705 in 1988, and this downward trend is set to continue. The dairy industry has seen a drop in employment from 10,058 in 1980 to 8,179 in 1988. Again, this trend is expected to continue as rationalization progresses.

The numbers employed in the manufacture of *bread, biscuits, flour and confectionery* have seen a serious decline over the same period – from 9,369 to 6,586.

Two categories have shown an increase in employment over the period of study, those being *miscellaneous foodstuffs* and the *processing of fish* and other edible seafoods, the latter having almost doubled in size. This growth will certainly not continue at the same rate.

The other sectors of the food industry have all seen significant declines in the level of employment. In the cocoa, chocolates and sugar confectionery sector there was a decrease in employment figures from 4,592 in 1980 to 3,046 in 1988. Secondly in the animal and poultry feed sector employment figures have also declined from 2,894 in 1980 to 1,948 in 1988. The fruit and vegetable sector experienced employment losses. Figures show a drop in employment from 2,050 in 1980 to 1,294 in 1988. Numbers employed in the sugar sector decreased from 2,008 in 1980 to 1,188 in 1988. Employment figures in the grain milling sector show a reduction in employment from 1,602 in 1980 to 842 in 1988. Finally in the oils and fats sector there was a decline in employment from 596 in 1980 to 369 in 1988.

Productivity and labour cost developments in the food and drink sectors (1980–88)

Gross output in the food sector, valued at current prices, rose from £2,853 million in 1980 to £5,780 million in 1988, i.e. it increased by 100 percent. Meanwhile the Consumer Price Index (1980 = 100) rose by 95 per cent, so that one could speak of stagnation of the deflated output values.

It is argued, however, that greater insight into the performance of a given industry, particularly in terms of factor yield as against factor cost, may be attained by comparing the development of productivity to that of the real product wage. The productivity variable is calculated by dividing the index of numbers employed into the index of the volume of output. For its part, the real product wage is calculated by dividing the index of output price into the index of average weekly earnings (a proxy for the wage rate). The difference between the two, termed the productivity gap, is commonly referred to in discussions of the ability of trade unions to 'erode' productivity gains by pushing up factor prices faster

than output prices have been rising.

The most recent Census of Industrial Production (1988) tells us that the volume of output rose, between 1980 and 1988, by just over 40 per cent in the food sector and by just below 20 per cent in the drink sector. Compared to the base year (1980 : 100) employment in the former sector fell by about 22 per cent and in the latter by about 36 per cent in the same period. Thus, the volume of output per worker ('productivity') rose by about 80 per cent in each of these two sectors.

In the *food* sector, weekly earnings rose exactly in step with the Consumer Price Index, while output prices lagged clearly behind, increasing by just 68 per cent. Thus, the real product wage (the wage adjusted for output price developments), as seen from the manufacturers' perspective, displayed an adverse development.

The *positive* gap between productivity and real product wage was quite slight in the 3 years 1981-83, was somewhat more substantial in the following three years and only reached a conspicuous extent in the years 1987 and 1988. Thus, taking the period 1980-88 as a whole, it can be said that real wage developments fell relatively little behind productivity developments in the food sector.

In the *drink* sector the shedding of over one-third of the original workforce, when combined with an output volume development much in contrast to that in the food sector, resulted in a strikingly consistent net productivity gain. The gap between the productivity index and the real product wage index tended to fluctuate around an average of 35 points throughout the period. This contrasted with the unpropitious start and the very late flourish exhibited by the food sector.

1.8 Training implications

The sectoral survey serves to highlight a range of important facts which must inform training policy development at both national and enterprise level in Ireland.

In terms of decision-making location, output and employment, the food and beverage industry is clearly at the centre of wealth creation in Ireland, whilst it contribution to employment creation is considerable. The location of much of its productive capacity in rural areas can only add to its importance as an employment provider following on from the changes engendered from the reform of CAP. Whilst the increased sophistication of production methods coupled with the move to greater emphasis on added value products means a growth in full time as opposed to seasonal workforces. This makes it all that more vital that training be utilized to sustain and were possible expand the sector.

As the sectoral survey has shown, no overall generalist training approach, given the sharp differences in profile even between sub-divisions within the sector, could possibly prove effective. Rather training aims and objectives must reflect the particular and emerging realities. This means that whilst huge capital investment programmes appear to have reached somewhat of a plateau on the production side in the brewing industry and dairy product industries. The same degree of technological change and its associated capital investment would still appear to be awaited or to be in the process of occurring in the meat and fish processing sectors.

Investment in sophisticated production technology has been associated with the development of ever larger plant sizes, and growth in overseas markets. So we can say that for workers and managers in the Irish food and beverage industry the experience of rapid technological change has been multifaceted. On the one hand it has moved skill requirements away from a traditionally-acquired skill to a taught-skill base and on the other hand it has enhanced the need to develop interpersonal skills to respond to change as a constant factor of the employment experience. And this for all those involved in the sector. This means that training provision to meet emerging needs must now extend its remit and respond to a wide range both technical based as well as interpersonal-skill and multicultural-based training demands.

Prediction is always a dangerous pastime. But at the same time demanded from reports such as this. As the review has shown, there has been a growth in added value meat and fish processing companies in the last decade and with it an enhancement of skill and ever greater demand for less generic and more specialized forms of training.

If this apparently unstoppable rise in specialized training demand has occurred, making training an ever more difficult task, at the same time, as the figures show, there has been a marked consolidation of production workers within an ever fewer number of plants. The consolidation on site of a more focused workforce must surely enhance the possibility of effective training delivery.

At the same time, the increase, though still modest in relative terms of technical support staff, as shown in the sectoral review, requires greater thought to be given as to how such staff could be best supported, particularly given the mismatch of rural firm location and urban training provision.

The changes as described in the sectoral review have clear implications for managers. The experience of increasing environmental turbulence: automation, biotechnology, enhanced plant size, downsized employment grouping coupled with increased globalization, means that for the manager there exists a constant need to enhance learning and with it good practice. On the training side the dilemma is one of outsourcing training delivery whilst at the same time ensuring a sufficiently customized product.

All these rapidly changing facets of the industry pose serious dilemmas to public sector organizations, traditionally focused on training for entry into the labour market.

2. CONTINUING VOCATIONAL TRAINING

2.1 Continuing vocational training in Ireland

FAS the national training authority plays a pivotal role in the Irish training scene, linking state and private sector provision as well as the social partners and increasingly the European Commission.

Established under the 1987 Labour Services Act, as the Training and Employment Authority (FAS), the Act authorized FAS to carry out the following main functions:

- to provide and promote training and retraining for employment and to assist and co-ordinate the provision of training by others
- to provide employment schemes
- to provide assistance to persons seeking employment in the state
- to assist in the development of local community groups and co-operatives
- to assist persons seeking employment in other EC countries
- to collect and publish statistical and other information on FAS and related matters
- to engage in consultancy and manpower related services, on a commercial basis outside the state

For the fish processing sector statuary responsibility rests with BIM. A state sponsored body, Bord Iascaidh Mhara (The Sea Fisheries Board) is the authority responsible for industrial training in this combined sector. However its main focus has been with the catching sector. Impediments to provision for the processing industry are seen as follows:

- lack of appreciation of the benefits of training
- the diversity of the industry in terms of scale, product lines and the location of firms
- shortage of skilled instructors; and
- lack of priority at an institutional level with respect to mandated responsibility for the processing sector

2.2 Enhancing good practice in continuing vocational training

Whilst fully acknowledging that the main responsibility for continuing vocational training lies with individual firms, FAS has sought to further enhance good practice via an interlinked leverage system of grants and associated training advice.

The Industrial Training Act of 1967 introduced a training levy/grant scheme accessible to firms employing more than 15 with a turnover in excess of IR£150,000. Using the leverage principle such firms paid a percentage (1–1.5%) of total annual payroll to the national training authority (then AnCO), and subject to a positive assessment were subsequently permitted to claim up to 90% of this back. The scheme, which still continues, aimed at improving the skills of employees at all levels from operative to management. To avail of grants under the scheme certain conditions have to be adhered to. For example, the training need has to be clearly identified and linked to the firm's strategic business plan, and there is a limit of £20,000 payable to any one firm for training purposes in any one year. In addition trainers used by firms have to be approved by and registered with FAS.

The success of this leverage approach to reinforcing in firm training can be roughly judged in two main ways, the dimensions of the industry-sourced funds now appearing in the scheme and the number of trainees supported through such schemes. The levy income of FAS recorded in the year 1989 was IR£2,119,000. This sum represents contributions from the following industry sectors:

Engineering	£ 546,000
Construction	£ 425,000
Food, drink and tobacco	£ 456,000
Chemicals	£ 381,000
Printing	£ 147,000
Clothing and footwear	£ 88,000
Textiles	£ 75,000

One of the most pervasive influences on continuing training policy and practice in Ireland is the large percentage of the workforce who are unemployed. Unemployment currently stands at 22% (302,000). This has put enormous pressure on the exchequer not only in terms of social welfare but also to provide training for those on the unemployment register. This issue is further compounded when we consider that the vast majority of those unemployed are in the 18-25yr age group. This has led to a downgrading of priority which might have been given to continuing vocational training. Since its formation FAS, the national training authority, has had responsibility for training the unemployed as well as those in employment. Political and social pressure has meant that over 90% of its budget has been spent on measures to combat unemployment. In 1989, just 9% of its IR£215m budget was spent on continuing vocational training, although this represented 36% of throughput.

Whilst FAS is the government agency charged with developing an overall national training strategy we can see from the diagram overleaf that training is not the responsibility of any one department. This leads to fragmentation and a lack of national context for training, such as in other European countries.

By the mid eighties FAS had become acutely aware of the need to further refine its activities to anticipate changes effecting those in employment as well as to respond to the training needs of small and micro-enterprises.
To meet the first of these goals a mechanism that would ensure even greater feedback from industry and the social partners was sought. The six Industrial Training Committees (ITCs) were constituted to cover the following industries:

Food, drink and tobacco
Textiles, clothing and footwear
Construction
Engineering
Chemicals and allied products

The ITC for the food, drink and tobacco sector is made up of 12 persons and includes a representative from FAS; the Irish Business and Employers Confederation (est.1992); the trades unions as well as from a number of employers.

The success of this approach can be judged by the fact that FAS is currently involved in an exercise to extend appointments and the remit of these consultative committees.

Today it is difficult to recall the extent to which throughout Europe the contribution of SMEs to national economies went unacknowledged during the two decades following World War Two. By the early eighties the contribution and growing role of such companies could no longer be denied and with that their training needs. This was clearly the case in the Irish food industry with only 40 establishments employing 500 or more personnel out of a total employed population of c. 40,000.
The delivery of effective training to the small business sector is notoriously difficult. As a part consequence of this, many national and professional organizations, for example the Chambre de Metiers Brevet programme in France, have confined themselves to owner/manager training schemes and largely ignored below the management/administrative level.

Whilst not denying the need to enhance both the hands-on and strategic management levels in the small business sector the approach taken by FAS was both more subtle and more wide ranging. The scheme of which in our work in the last year we have received numerous favourable reports from the SME and micro-enterprise sector relies for its implementation on a bedrock of face-to-face advice offered on a regional level by FAS officers. Financially the scheme was skewed to favour micro-enterprises.

The Training Support Scheme as established by FAS in 1990 offers grants covering a percentage of training costs dependent on the size of the firm. 65% of costs are available to firms of 50 staff or less, 40% to firms of 51–200 staff, and 25% to firms of 201–500 staff. Approval of schemes is subject to availability of funds and to ensure increased emphasis on small firms 50% of funds are allocated to firms in the employment category 1–50, 30% to firms with 51–200 staff and 20% to firms with over 200 staff.

Current practice in relation to ongoing training in Irish-owned industry generally is that the quantity of staff receiving off-the-job training is significantly lower than in countries such as Germany and France, the duration of such training is shorter, and the more highly qualified the employee, the greater the access to such training. However within the large food and drink firms there is an impressive commitment to training which is on a par with training in other EC countries. In general, however, the role of FAS is as a facilitator and supporter of ongoing training. Firms in the food and beverage industries view their needs as being highly customized and internally operated.

The effectiveness of the training supported by these various approaches whether stand alone, FAS supported or led, is less easy to judge. It was partially in this respect that the current study, by concentrating on five companies put forward by FAS as examples of good practice, attempted to throw some light on the question of quality in continuing vocational training in Ireland. It also allowed by the parallel studies being carried out in the other member states international comparisons. Such an approach afforded some comparative feel for the standing of continuing vocational training schemes in Ireland.

The developments occurring in Ireland in the field of continuous vocational training were paralleled by similar moves in all the Member State countries driven by similar international trends towards globalization and enhanced technological sophistication. But it may also be that common membership of the Community-wide training programmes led to increased pooling of approaches by national training authorities. What is certain is that FAS's role as Irish representative on such committees has meant that the authority has acted as the main conduit of European developments in the field, actively encouraging participation in such programmes and vigorously diffusing the spin-offs from the programmes as they have occurred. The current sectoral and best practice review, under the FORCE programme, would be a further example of the facilitator role played by the authority.

2.3 Training delivery

So far in this overview the report has concentrated on the public sector approaches as exemplified by FAS to enhance continuing vocational training within company settings. As currently far less is known about actual company programmes, it has proved difficult to provide a more balanced overview; a situation which hopefully the subsequent case studies will do something to redress. What it is possible to identify, due to FAS's system of registration of trainers is the number of official trainers now involved in the private sector.

In what follows, we express per 1000 employees the number of training managers and instructors in these sectors in 1989, as reported by FAS:

Sector	Training managers	Instructors
Food, drink and tobacco	6	12
Engineering	13	11
Printing	10	19
Construction	10	5
Textiles/clothing	12	16
Chemicals and allied products	8	19
Average of six sectors	10	11

In 1989 the food drink and tobacco firms were reported to have employed 287 training managers/executives and 590 instructors for a workforce of 48,440 persons.

With the exception of the construction Industry, the training resources for the food, drink and tobacco sector were conspicuously below the level exhibited by other sectors, notwithstanding the fact that the proportion of the workforce 'covered by the training function' was generally comparable across the

six sectors reported. The figures also suggest that the training function was not seen as sufficiently important to be represented in its own right at senior management level within the sector.

This may be because support for more advanced training has not been sourced internally but has been acquired outside.

For example, the need for achievement of the ISO 9000 quality standard has resulted in firms availing themselves of external consultancy training services available from, for example, the National Food Centre (a division of Teagasc, the national agricultural and food authority). The centre offers general training programmes run in conjunction with UCC and FAS in addition to training consultancy in quality systems management. Approximately half of the food companies registered with the National Standards Authority used this service to help them attain the ISO 9000. Consulting services in quality and process technologies are also provided by EOLAS, the state agency responsible for the development and application of science and technology in Irish industry. In the case of ongoing external management training, the sector is well catered for through the Irish Management Institute, the third level sector, and the professional institutes as well as private training firms.

2.4 Expenditure on training

Expenditure on training is notoriously difficult to calculate, since so much of it is provided within the firms on an informal basis. In addition, different firms account for their training expenditure in different ways. A survey conducted by Tansey and Roche for the Industrial Policy Review Group notes two important features in relation to training in Irish industry. First, modern industries spent appreciably more than traditional industries on training, regardless of whether ownership was domestic or foreign. Second, amongst firms in traditional industries, foreign companies spent more than indigenous companies on employee training. With the food and beverage industry in Ireland dominated by indigenous industries, low expenditure could have been predicted. But as the current case studies show this is not inevitable and their is evidence of significant changes in this area.

2.5 The role of the social partners in decisions affecting employment and training

Little if any training effort in Irish industry in general is centred on in-company programmes of a 'joint' nature, i.e., involving participants drawn from both management and employee interest groups. This is only noteworthy in the sense that such a training model features prominently within organizations in other member states, and could serve as a focal point for subsequent collaborative effort towards enhanced competitiveness and productivity.

This has perhaps evolved from the nature of the traditional industrial relations structure, whereby representatives of employers and representatives of labour were perceived to exist purely in an adversarial framework. Their training took place in isolation. There is ample evidence to support this and indeed that this is situation has continued despite the increasing approachment that has occurred as a result of the Programme for National Recovery and more recently the Programme for Economic and Social Progress.

The primary official means whereby the social partners, that is employers' organizations, trade unions, and government, work together on decision-making with reference to employment and training is via the Industrial Training Committee for the Food and Beverage Industry.

2.6 Developments in training in the food and beverage industry

As a necessary preliminary to understanding the actual as well as possible future developments in vocational training in the food and beverage industry, the UCC team decided to explore two further areas, existing initial training in the sector, and how this fitted with emerging trends in continuing vocational training in other Member States. This information coupled with the overall sectoral review, the examination of FAS as a facilitator of continuing vocational training in the private sector would, it was felt, serve to provide both a necessary and sufficient background against which the case studies could be set.

2.7 Initial training in the food and beverage industry

Dominated until recently by seasonality, low added value production for indigenous or intervention markets, the overall employment profile in the sector has been dominated by the unskilled general production worker. Employee recruitment had historically tended to be at the Inter or Group Cert educational level, into general operative positions. It has become more common to recruit those educated to Leaving Certificate standard at this entry level. The move towards huge capital investment has led and will continue to lead to demands for increased specialization and for more highly educated recruits. Already this has resulted in a trend towards the employment of those with relevant third level qualifications in preference to recruitment of school leavers.

As the sectoral survey has shown, in the last decade the overall number of jobs in the sector has fallen. We are now therefore talking about a smaller overall number of operatives per plant needing to be fully aware of the need to commit themselves to continuous upgrading of their existing skill and knowledge base throughout their employed lives.

The meat industry

Meat processing general operatives require a higher level of skill than is currently demanded for operatives in other sectors of the food industry. While new entrants begin to make a contribution after 12 weeks, in the case of butchery apprentices, for example, it is important to emphasize that to become a semi-skilled butcher in the beef processing (non-retail) sector will require at least 12 months and up to 36 months of initial training depending on the skills required.

The apprenticeship model has a long history in the meat processing industry, and the concept of the apprentice entrant is well understood as a route into a skilled operative cadre within the industry.
Butchery apprentices begin with 4 weeks of induction, followed by 24 to 36 weeks of basic skills training.

Dairy processing firms
The following pattern of introductory training is typical once a full-time employee joins the firm: The new employees begin with a one-week induction course in health and safety standards and requirements. This first week also provides them with information on their own welfare rights and procedures to be followed to avail of these rights. General operatives then have 6-8 weeks of on-the-job training before they begin to develop the necessary skill level to carry out their duties fully.
There appears to have been no tradition of apprenticeship training for operatives entering the dairy processing sector, no guild, with its own closely guarded entry and training mechanisms. What certification is available has been developed as a standalone qualification generally accessible to technical and managerial grades.

The brewing industry
In the *brewing* industry, the degree of initial training receized is similarly dependent on the level of specialization required for the position being filled. At one brewery in Ireland, it takes two weeks to train new forklift operators (after their induction course). As with the meat processing industry the brewing sector has a long established understanding of the apprenticeship model as a new entry route into the industry. *A trainee brewer* will undergo 2-3 weeks of induction training, followed by 2-3 years of ongoing training to become a brewer. This qualification is conferred by the Institute of Brewers.

Fishing and fish processing
Rapidly expanding and with enormous potential the fish processing sector represents nevertheless a relatively new addition to the internationally traded food sector in Ireland. Training in this sector appears to be largely informal and to date has concentrated on the sea-fishing sector.

As far as fish processing is concerned, the majority of employees learn on the job. This essentially means following the example of the more experienced workers, who can provide instruction. The national training centre is in Donegal.

The majority of the 113 firms recorded by BIM as making up the fish processing capacity in Ireland employed 20 persons or less and were too small to be included in the levy/grant scheme. However there have been some recent attempts by BIM in conjunction with FAS to redress this problem. Some implications of this situation will be addressed both in our case study of a firm in the fish processing industry and in the conclusions to the overall study.

2.8 Conclusion
Vocational training has in the major mainland European countries been driven by a partnership relationship between the public and private sector, the Dual System. Here there is a comprehensive network of clearly articulated Federated Trade Organisations which jealously control access to a vast array of officially recognized skilled occupations and with that training content and certification. Concerned to sustain both the quality of the certificated skilled worker as well as the product the focus has been on new entrant training. Affected by similar trends, globalization and increasing technological change, the trade organizations involved are increasingly preoccupied with evolving training strategies including an evaluation of learning by objectives to enable their members to respond positively. Given existing cultural understanding of industrial learning within mainland Europe it would appear certain that whatever shifts in emphasis occur, training will remain firmly the province of federated trade organizations and status within the federations will rest on certificated learning.

The United Kingdom and Ireland abandoned the traditional five year apprenticeship scheme and with that the Industrial Training Boards in the 70s. With no lead in the area, industrial training slumped alarmingly. The response has been to make a virtue out of necessity. With no institutional framework in place, unlike mainland European countries the United Kingdom authorities have developed a parallel structure, which via the TECs (covering England and Wales) and the LECs (Scotland) incorporate the views of employers at a regional level in training budget prioritization and allocation, whilst at the same time building up comprehensive training packages which are formatted in terms of learning outcomes and objectives and ascending levels. In contrast to mainland European programmes, the programmes are not time-bound and embrace through the concept of ascending level continuous training requirements up to and including third level.

Within the Irish food and beverage sector there currently exists no coherent scheme of vocational qualifications either at the initial training or continuous training stage. Traditionally we have adopted standards such as those from the City & Guilds of London Institute. There have, however, been problems in their implementation and typically they cannot be achieved on the job, and are not based on Irish standards. There is no agency responsible for certification of work-based qualifications. The recently formed National Council for Vocational Awards will work principally in areas such as post-leaving certificate courses.

This lack of institutional framework of development and accreditation has led to continuing vocational training being carried out in an ad hoc nature. Since grant aid is often contingent upon training to recognized vocational standards, many companies do not seek the involvement of government agencies when developing their workhorse.
The first Commission training programme to address the area of continuing vocational training is the Force programme. It reflects a wider movement occurring within the Member States, and seeks to address issues such as accreditation and transferability.

PART 2:

1. Introduction
2. Participating companies
3. Avonmore Foods plc.
4. Guinness Dublin
5. Galtee Foods
6. Poldys Fresh Foods
7. Tawnagh Seafoods

BEST COPY AVAILABLE

Given the wealth of experience that had accrued it was clear that the Centre for Sectoral Analysis and Vocational Training would draw heavily on the expertise to be found in the training authority as to an extent on the support of the members of the Sectoral Training Committee.

The UCC team headed up by Professor Deirdre Hunt, Associate Professor of Management from the Department of Marketing and Management, began their work by presenting an initial outline of the studies' aims and objectives to the National Training Committee for Food, Beverage and Tobacco. This was followed by a consultation period during which the chief research fellow working on the project, Mary Ward, visited and held detailed conversations with regional FAS officers in order to identify companies which in their opinion demonstrated outstanding training practice. As a result of this consultation period the companies were prioritized and forwarded to the Commission's programme team.

Along with the Irish companies each Member State nominated up to ten companies which it was felt provided a fair reflection of the food and beverage industry. Across the Member States fifty companies were selected for detailed case analysis.

Selection was primarily based on the principal of the usefulness of the case studies as analyzed for both the workforce and the companies. The first criterion therefore was transferability to other companies and other contexts. This criterion, the most important, was supplemented by three others.

- Innovation – The innovation element concerned
  the organization of the training
  the contents of the training
  the training methodology

- Type of company –
  from the product viewpoint
  from the structural viewpoint

- Type of training – with reference to
  target group
  organization (internal/external)
  funding
  degree of consultation with the social partners
  specific qualifications

The mix of these categories needed to take due account of the diversity found within the sector and highlight specific features.

The final selection was based on the principles of representativeness for all Member States, exemplary character, transferability, diversity and complementarity of continuing training schemes within the sector. Accordingly as situations and subsectors differ from one member state to another each country was represented by a minimum of three cases which were considered to be representative at national level. A total of five cases were selected for analysis in Ireland.

2. PARTICIPATING COMPANIES

2.

Table 1 – Participating companies

Company (NACE)	Employees	Activity	Classification
Avonmore Foods (Plc)	2771	Dairy & pigmeat processing	412/413
Guinness (Dublin) (multinational)	808	Brewing	427
Galtee Foods (co-op)	304	Pigmeat processing	413
Poldys Fresh Foods (private)	165	Food processing	3
Tawnagh Seafoods (private)	12–120	Fish processing	415

22

3. AVONMORE FOODS PLC.

Background
Avonmore Foods Plc., a company listed on both the Irish and London stock exchanges is one of Ireland's largest food groups. Its turnover in 1991 amounted to IR£575 million (1990 – IR£499 million). Today it employs over 6,000 people, 3,293 of whom live in Ireland. Until recently entirely Irish based the company now operates in Ireland, Europe (including Eastern Europe) and the U.S.A. On all counts turnover, employment, product diversification and company acquisitions Avonmore is growing strongly. Its principal activities are the processing and marketing of dairy based products and food ingredients predominately whey, liquid milk and pig-meat products. The group also manufactures animal feed stuffs and is involved in trading in agricultural products including grain and agricultural inputs such as fertilizers. The group has five operating divisions in Ireland supported by an extensive research and development unit.
Given the restricted size and the low income base of the domestic market, the company's expansion options can be listed under three headings, product diversification, enhanced market share both at home and abroad and expansion of exports. All of these three headings have been achieved in the main via a company acquisition strategy. This has been particularly true of the period following the move to develop a PLC status for the major company activities in 1988 whilst still retaining Avonmore Co-operative Society as the ultimate source of ownership.

The commitment to developing a quality culture at all levels of the organization has been an important factor in the success of Avonmore. The company recognizes that continual improvement in quality is a pre-requisite for sustaining its successful expansionist performance.

Continuing vocational training
Avonmore's philosophy of training is summed up in their own phrase as "a well-skilled workforce is a very valuable asset". The company training policy document goes on to state "to ensure that the required level of skills essential in keeping the business on a sound financial footing are available at all times, Avonmore is committed to the training and development of all its employees". Clearly Avonmore's training policy is in line with its corporate strategy of expansion and acquisition. It also reflects the change in orientation also shown in its shareholding profile away from a producer-led towards a consumer-driven organization.

The priority areas for training as currently stated by the company are:

Management training
Quality improvement
Communications
Business skills
Sales
Craft and operator updating

Responsibilities for training
The divisional Human Resources Manager is responsible for training. Avonmore also employs a training co-ordinator. This is a largely an administrative position. The incumbent primarily processes requests for training and organizes courses.

On an operational level, needs are identified by line managers. Normally this does not involve any formal consultation with the individual employee. From there a plan is drawn up which is presented to the Human Relations Manager, who in turn presents it to the Human Resources Director for agreement. There are no hard and fast rules for determining training budgets.

The fact that training is largely informally organized, it is argued, allows for greater flexibility and ease of response to change in emphasis, such as the emergence of new technology, added value products emanating from the in-house R. and D. division or E.C. directives.

Characterized by a strongly independent and self sufficient ethos which puts responsibility for development squarely within the company's own remit it is not surprising to find that training is also largely internally sourced. For its quality training, for example (except at the initial stages), "Avonmore staff train Avonmore people." This is a policy, it is felt, which enables the company to customize its training to its particular requirements.

The one exception to this general rubric is management training. Here a wide variety of external trainers are used, ranging from professional private sector organizations to publicly funded initiatives.
The role of the unions in Avonmore does not deviate in any significant way from the national norm which has defined unions' traditional remit as concerned with working conditions and continuity of employment, in a way which has not overtly focused on training. Given this perspective, training not surprisingly, has evolved as an employer responsibility within the company.

The training programme mutually chosen to act as the central core of the Avonmore case study clearly exemplifies both company and changing market conditions. With the move toward a global presence has come an increasing emphasis on customer requirements. In such a situation the companys' ability to guarantee product quality becomes of utmost importance. But such is the interrelated nature of the state-of-the-art food-production technology in Avonmore that only by developing a comprehensive programme that involved the entire range of operatives and technicians could such a quality guarantee be assured. The Customer First training programme as its name implies was designed to refocus the company on the external demands of its increasingly large and complex customer base.

Customer First training
This training initiative took place in the milk products division of Avonmore, in Ballyragget Co. Kilkenny. The division employs 489 people.

Aim
During 1989, following the floatation and aggressive internationalization strategy adopted by Avon-

more, the need was established for:

- Quality ethic across the company.
- A route to achieving continual customer satisfaction.
- Methods to improve competitiveness, thereby securing a prosperous future for the company.

Target and length
The programme was made up of:

groups of 15
2 modules x 4 days
facilitators who presented each 1 day session as a team

The mix of participants was across all departments to ensure an active interchange and to encourage teamwork.

- General staff training module
  general staff training was called "Customer First Awareness Sessions". It consisted of a 1 day session covering all hourly paid staff and was presented by a team consisting of a Customer First Facilitator and a line manager. The staff were again mixed across all departments, each group was approximately 25 in number. All staff were issued with a Customer First pocket book (aide memoire) as part of this course.

Original or noteworthy features

- Developing the programme proved that internally sourced and delivered training was an effective method.
- Customer First training was delivered by "Avonmore people to Avonmore people".
- Avonmore staff became in-house experts in the "Customer First" perspective.
- The programme demonstrates that a comprehensive in-house training approach can enhance group cohesion across all divisions and between levels.
- High uptake 98% attendance occurred.
- Lead to identification of fundamental issues that prevent progress occurring.

Benefits
A number of spin-off benefits have arisen from the implementation of the Customer First programme. Some examples are included in the following list:

- A full time position of Customer First Co-ordinator has been appointed.
- Absenteeism was reduced from 4% in 1988 to 3.6% in 1992.
- The savings resulting from spin-off projects in 1990 amounted to £5 million. (Total cost of implementation was £100,000.)
- Communications improved as evidenced by projects such as the establishment of an in-house magazine.
- A link was established between the Customer First Training and the maintenance of the ISO 9000 standard.
- Customer feedback indicated that as a result of the programme Avonmore was now regarded as a quality company.
- Increased employee identification with changing company priorities.
- Extended the benefits of T.Q.M. across other divisions not before involved.
- Strengthened training commitment long term.

Avonmore Foods Plc. has fostered a climate of change since the early eighties and sees the continual improvement in quality promoted via comprehensive training (as exemplified in this case study) as a pre-requisite for developing and sustaining performance in the post-1992 era. By adopting a Customer First approach, Avonmore has been able to intervene in the production process to enhance product quality. In Ireland alone, this has opened up new markets, including baby food manufacturers with their exacting quality demands. This enables the company to implement its planned strategy to pursue market development via added value product development. A recent report on the food industry in Ireland recognized the move to added value production as one of the most important development areas for the industry, if it is to survive in the Single European Market.

Continuing feedback as expressed for example by customer satisfaction, staff turnover or absenteeism figures will enable more rigorous evaluation of this important and innovative training initiative to take place. This in turn will enable the company to further improve and adapt the programme. To this effect the development of an executive steering committee to monitor such feedback is of particular importance. While cost savings on the input side will accrue initially, most gains will be made from enhanced profitability via increased turnover as the marketplace recognizes the superior product quality.

One of the more interesting aspects of this initiative is its transferability as a package. The programme appears to have minimal if any cultural imperatives which would undermine its applicability in other divisions of the company or indeed other international plants. The company has already made some mutually beneficial technology changes across the organization as a whole. There is no reason to suggest why the Customer First initiative cannot also transfer. This transfer of good practice may be particularly relevant to Eastern Europe as the transformation from controlled market economies takes place. Since there are no international vocational standards which can be applied to this type of quality training, there are no barriers to implementing

the Customer First programme in any of its other plants or indeed more widely throughout the Member States. Avonmore, through developing this comprehensive training programme, has gained critical knowledge as to how to further improve the implementation of the programme and in addition how to effectively transfer this to its other overseas units in the Member States, Eastern Europe and the US.

Another feature which should aid transferability is that the training took place from within and therefore was customized to the requirements of Avonmore. The appointment of a full-time Customer First Co-ordinator will undoubtedly facilitate this process.

The next phase of the training will be to internalize the ethic, to recognize that within the work setting, every member of staff is in fact a customer. Avonmore intends to implement this programme across other divisions. Staff in the milk products division are currently producing a video which outlines what the benefits have been for them as individuals as well as for the company.

25

4. GUINNESS DUBLIN

2.

Background

Guinness Plc. ranks as one of the top ten companies in the European Community, as measured by market capitalization. On the same basis, it is the second largest consumer goods company in the EC. Guinness Brewing world-wide is the fourth most profitable brewer in the world and the eleventh largest, measured in terms of volume. Guinness stout is one of the very few truly international brands of beer, is brewed in 42 countries and sold in approximately 130.

Guinness Ireland Ltd. is the parent company of all the Guinness companies within Ireland which are primarily represented by the brewing division. Guinness Ireland Ltd incorporates Arthur Guinness Son & Co. (Dublin) Ltd (AGS(D)); Harp Irl. Ltd in Dundalk; E. Smithwicks and Sons Ltd in Kilkenny; Cherry's Brewery in Waterford and MacCardle Moore in Dundalk. Turnover in Guinness Ireland for 1991 amounted to IR£ 704.4m.

AGS(D) was established in 1759. The company located near the centre of Dublin is devoted to brewing stout (Black Beer) and Furstenburg Lager (a premium German lager). It is located at St. James's Gate and is firmly rooted in the traditions of this area.

Since the early 1980s, the plant has been the subject of major capital investment with in excess of IR£140m. spent on the site. The plant now constitutes one of the most advanced brewing plants in the world. The introduction of such monumental changes has led to equally massive changes in both total manpower and its deployment, as well as in knowledge and organizational base realities for all those involved, managers, associated support staff, operatives, maintenance personnel and social partners.

The workforce has been reduced from over 3,000 to just over 800, by a combination of introducing a highly automated plant, productivity measures, and hollowing out of support functions such as catering, security and cleaning. The reductions have been achieved without compulsory redundancy, and with generous terms for those taking early retirement.

Management at the brewery recognized that radical changes needed to be effected in both the structure and culture of the organization to support its business mission, and were determined to see these through. It is against this background that the subsequent and indeed the increasingly prominent and strategic role played by training in the transformation of the brewery has to be understood.

Continuing vocational training

Training in AGS (D) is linked to, and reflects the business plan. It aims in a cost-effective way to facilitate learning, to update the skills and knowledge of individuals, and to ensure best practice performance and behaviour which contribute to the attainment of the company's goals and objectives.

The principal objective of the training function is to develop a high level of versatility among all categories of employees. This aim has two aspects to it – (a) people to have acquired some knowledge outside the immediate requirements of their job and (b) people to have acquired knowledge of functions along the full spectrum of production activity.

In 1991, expenditure on training amounted to IR£540,000. This figure includes the cost of the company's training personnel but excludes the wage costs of trainees.

The training department played a major role in preparing the workforce in the brewery for the massive changes which it has experienced and which are seen as ongoing. As part of the total quality stance existing within the brewery, the training department reviewed its activities as a deliverer of training to employee clients throughout the site.

Working to an ISO 9002/ EN 29002 : 1989 standard, the training department argues that this has enabled it to improve the quality of its training systems, because the standard demands that it develop and maintain written procedures which state clearly how the business of training is conducted.

Training in AGS(D) forms part of an of overall strategy for comprehensive organizational change. This change was brought about mainly by the need to provide radical capital and information handling investment with an appropriate human resource base. To achieve this AGS(D) decided that a necessary condition of this was to develop a team culture which would pervade the entire organization culture. Formerly, the bulk of training investment was in manual and technical skills (such as the Institute of Brewers qualifications). However the radical changes in working practice which the rationalization programme effected could not be supported by technical training alone.

Features which will necessitate/enhance a team approach:

The radical technological changes occurring on site have and will continue to lead to

- less staff and a flatter organization
- enhanced individual accountability and responsibility for delivery of results
- teams being able to respond better than individuals with the complex changes in technology currently being experienced

An innovative method which the company employed was to use the outdoors as a training medium using the services of Wright Consultancy. The strategy behind this particular training programme was to expose a critical mass of people to the demands and values of good teams and so move their thinking to the realities, challenges and excitement of teams as well as the difficulties, risks and skill demands of teamwork.

Some of the *benefits* of using the outdoors were identified as:

It dismantled barriers between grades and/or functions with each member being treated equitably;

It gave emphasis to the communication skills of participants without reference to their brewery functional skills;

Everyone had an opportunity to participate equally and to lead;

The consequences of good or poor problem solving and decision making were immediate;

It enabled participants to realize the full benefits of teamwork in the new brewery culture;

Because of the unusual (outdoor) surroundings, there was good recall of the learning and the retention was longer.

The use of outdoors training was an innovative approach to the company's need to reinforce team work development. Essentially it is an alternative approach which is firmly based in the experimental learning cycle (developed by Kolb). Its supporters, including at this juncture AGS(D), claim that it has many advantages over classroom-based learning, including:

it is a challenge to the participants' conditioned way of thinking and seeing. Assumptions and defence mechanisms become exposed because the normal 'props' are taken away.

It involves the whole person – actions, feelings, as well as thinking processes. The medium is not purely intellectual. Participants cannot hide behind their 'professional' expertise. The whole self is presented to others and in so doing allows others to see glimpses of the real self without trappings of office, status and professional skill.

The risk and uncertainty is real and simulates life, as it can provide decisions ,options and alternatives to be acted upon. The situations demand action, and agreement must be reached without which there is unease and lack of confidence in those with responsibility. Failure to act in a positive manner provides an opportunity to review.

The use of the outdoors demands no pre-qualification. Success is not contingent upon any set educational background. This aspect facilitates the removal of barriers between different organizational groups and provides each member of the team with an equal opportunity to succeed.

The dominant and peculiar characteristics of outdoors training: reality, challenge, risk, uncertainty and involvement offer a potential for team development which does not always exist in other forms of training. It provides a powerful demonstration of the need for teamwork when the situation demands it.

The outdoor programme which was used by AGS(D) encouraged self-sufficiency and self-reliance yet coupled this with a powerful demonstration of the need for teamwork. It drew out decision-making and problem-solving skills and demanded planning and anticipative ability, leadership and loyalty to those 'above', 'beside', and 'below'.

In terms of transferability the question of certification poses the greatest problems. As yet no attempts have been made to quantify or evaluate the learning for this purpose. Perhaps one method would be the use of psychometric instruments. A possible design would use a pre-test administered before the instructional programme begins and a post-test given after exposure to the instructional programme. The variables measured would be associated with the objectives of the programme, in this instance team working skills.

Using the outdoors as a training medium appears not to be overly restricted by national culture. It is an extremely flexible form of instruction, which can be adapted to the specific goals of the organization.

Future training at AGS (D)

Training is viewed as a major input to the successful achievement of AGS(D)'s vision for the year 2000, embracing a requirement for managers to become leader managers, equipped with the skills of leadership, teambuilding, problem-solving and other attributes appropriate to new culture.

In practice this means that the future training plans currently in the process of being implemented envisage a growing requirement for interpersonal skills. Training at AGS(D) is seen as a significant tool for establishing a common language and culture to reinforce the new organizational community that is the outcome of the new far-reaching technological changes that have been embraced by the Guinness plant in Dublin.

27

5. GALTEE FOODS

2.

Background

Galtee Foods was established in 1967 by Mitchelstown Co-operative Society. It currently employs 307 people. In 1990 Mitchelstown merged with Ballyclough Co-op. The combined co-op now trading as Dairygold is currently the 4th largest player in the Irish food industry. The Galtee production facility, in Mitchelstown is the principle production unit of Dairygold Co-op's meat division. It is a wholly owned subsidiary of the Dairygold Co-op Society.

The principle reasons for its establishment were:

- To create a market for shareholders' raw material.
- To profitably dispose of whey (i.e. at that time used for pig-feed)
- To stimulate demand for pig food from the milling division.
- To introduce pre-packed bacon to Ireland.

Galtee meats currently employs 307 people on a full-time basis. Its parent Dairygold Co-op Society employs 2,300. The bulk of staff are involved in butchery. The ratio of men to women is approximately 3:1, with women mostly involved on the packing and administrative side.

Continuing vocational training

"Without training is like being without teeth, it affects everything"

So begins the Dairygold policy statement on training which since 1992 has integrated the training approach within specific operations such as Galtee. It is the society's policy to have each employee trained to the required standard to enable that employee to carry out the function of his/her position effectively. General and departmental managers are responsible for implementing the policy, with the personnel department responsible for monitoring its application and providing the necessary advice and support. To ensure that the society attains its business goals it is recognized that all employees must update their skills/knowledge. Training opportunities are made available as required in the interest of continuing improvement.

Dairygold recognizes that the successful implementation of its corporate objective is realisable only through a committed and competent workforce. Its policy embraces all employees and is implemented through the society's personnel function. All employees who need training and development consistent with the corporate, divisional (e.g. Galtee) and departmental plans will be provided with that training and development. At operative level Galtee Meats has concentrated its training efforts in two main areas, butchering and plant maintenance. In order to do this, it was important to examine the socio-economic background of its employees. This has lead to more effective training and increased transfer of learning.

Galtee is a levied company under the 1967 Training Act. It is also eligible for funding under the Training Support Scheme.

Report on a specific operation

Developments in technology are having a major impact on the pigmeat sector in Ireland. Increased technology brings increased challenges, none more so than in the maintenance of plant and machinery.

These challenges are due to:

increased mechanization

greater equipment complexity

enhanced requirements for maintenance organization and responsibilities

emphasis on safety and the environment

increased demand for product quality

increased pressure to achieve high plant availability and to contain costs

In Galtee, the need arose to develop its maintenance staff to cope with the ever increasing demands of its new high-tech environment. Different working practices needed to be adapted to meet these new needs.

After much debate and negotiation, a decision was made to set up an autonomous maintenance work group, which provided the focus for responding to the radical changes in working practices, job allocations and knowledge that technology changes brought with them.

It was clear from the beginning that one essential ingredient for the success of the technology upgrading program would be the multi-skilling of the existing maintenance group.

To develop its maintenance staff, Galtee in conjunction with the college of technology, decided to customize the already available National Certificate in Maintenance Technology.

The aims of the course were to provide participants with an understanding of maintenance strategies with the knowledge and skills necessary to:

- undertake maintenance of complex machines and systems
- develop maintenance and reduce costs
- undertake multi-disciplinary maintenance assignments
- develop fault diagnosis and repair skills.

An important aim of the course was to enhance the personal growth and development of the participants.

This course was just one component in a strategy used by Galtee to develop a group-based approach to organizational change. It was the result of months of negotiation between management and staff. The above training was a critical aspect of this development in that it updated the skills of a critical core work group and enabled them to proceed with confidence.

Original and noteworthy features of the course

The training was carried out mainly in-house and used a variety of media, including distance learning. The training also provided credits towards the Diploma in Advanced Technologies Maintenance which is accredited by the National Council for Educational Awards. Since most of the training was carried out on the job, this programme marks a significant departure from traditional routes to certification, which have required long periods within a formal training environment when they have been available within the national context.

Whilst all this change has taken place, the structures which Galtee had developed in the area Human Resources have continued to enable it to achieve its objectives. The organizational and capital restructuring as well as an increased emphasis on technology have given rise to a more human relations focused type of training.

Also critical to this process was the development of good relations with the social partners. Coming from an industry with a history of poor industrial relations, this was a slow process. However, it has been achieved. There is much evidence of positive creative collaboration between unions and management. This is particularly in evidence in the training programme for advanced technology.

Its future training will seek to consolidate current progress as well as concentrating on areas such as continued quality improvement, interpersonal skills and languages. Implementation of its training policy will enhance good manufacturing practices and ensure the workforce always possesses an adequate skill and knowledge base to positively engage with the company's process technologies to produce premium products.

29

6. POLDYS FRESH FOODS

2.

Background
Since commencing business in 1982, Poldys Fresh Foods has emerged as one of the success stories of the niche sector within the Irish food industry. Group turnover for 1991 is estimated at IR£63 million.

The plant at Portumna (the subject of this case study) produces robed products and pastries including pancakes. Poldys Fresh Foods (Portumna) Limited which was established in 1987 is one of the most up-to-date "state-of-the-art" food plants in Ireland. The Poldys Group employs 550 people. The production facility at Portumna employs 107 people on a full-time basis. The company also employs a number of part-time and casual staff (total number in this category during Nov. 92 was 58). The majority of the employees come from a rural farming background, and are from within a 30 mile radius.

90% of the personnel is under 30 years of age. Recruiting from the young unemployed/school leaver population was a policy decision of the new factory in 1987. This was an attempt by the company to integrate with the local community and the new company's response to the growing problem of youth unemployment.

Continuing vocational training
Poldys Fresh Foods (Portumna) enjoys a reputation for quality. As a company, Poldys has a training policy which is synonymous with its quality policy.

Good manufacturing practices are of the utmost importance in the food business and Poldys recognize this. Not only does this quality apply to amenities, merchandise and service, but also to the people employed. Poldys' aim is to have their services provided by staff who feel involved and who are well trained. A number of forces have driven this approach:

- Probably the most pervasive is the young workforce. Over the first 3-4 years, Poldys experienced a very high level of labour turnover. When this was analyzed, the company found themselves competing with emigration as opposed to other companies. Portumna in common with many other rural Irish communities has been ravaged by emigration. There is a sense that emigration somehow "maketh the person". Poldys realized at an early stage that routine factory jobs were not going to be attractive in the longer term. People wanted more and training and development emerged as a positive response. Training became a rite of passage to maturity.

- Poldys is a levied company under the 1967 Industrial Training Act. It is therefore legally obliged to spend 0.9% of its turnover on training or be levied by the government.

- In order to develop its quality policy to comply with ISO9000, the company needed to include vocational training.

- External environment: legislation has for many organizations, including Poldys, been a catalyst for training. The main areas are in health and safety, also hygiene and quality. Also included in the main areas are the customer requirements. The customer is always right and recent trends would indicate that staff competence is increasingly being thought of as a factor in product quality.

The budget for training is allocated by head office in consultation with the general manager of Poldys Portumna.

Training is given in the following ways:

- Bringing in trained expertise in a given area to give the training
  (e.g. F.A.S. – Independent Training Consultants).

- "Sit by Nellie" approach.

- External courses
  (e.g. IMI, local colleges).

The company's commitment to training is evident from the large increase in the training budget since the company opened.

Expenditure on training in 1990 was just IR£7,379. Projected expenditure for 1992 amounts to £54,400.

Needs are identified principally through a performance appraisal system. Every member of staff is appraised annually. Other sources of training needs would include legislation and new technology. Appropriate training is given to employees where a need has been identified.
Poldys are levied under the 1967 Industrial Training Act. They are also eligible for grant aid under the Training Support Scheme.

Report on a specific operation

- Manual handling instructors course

Poldys Fresh Foods were conscious of the need to reduce the risk of accident in the plant and also the need to comply with current legislation. The E.C. directive on manual handling (90/269/EEC) will be placed in our national legislation by the end of 1992 and will then be subject to the enforcement procedures of the Health, Safety and Welfare Act.

Course objectives:
The course is designed for organizations that require their own house manual handling instructor. It satisfies the legal requirement for manual handling training to be carried out by a "similarly qualified person".

Course programme:
Introduction, legal aspects, accidents, anatomy, work physiology, ergonomics, fitness and flexibility, biomechanics, approaches to safe manual handling, instructing people, planning and preparing presentations, practical exercises in manual handling.
The individual chosen to attend this course works as a senior production operative. She was 22 years old and had worked with the company since completing her second level school-leaving certificate four and a half years ago.

30

A strategic decision was made by the management to provide instructors training to an operator. This decision was motivated by the company's desire to give recognition to each employee and also to break away from what they felt was an emerging trend, which was to equate training with management.
In general the benefits of this course can be summarized as:

- The participant gained the ability and confidence to acquire the required theory and techniques of safe manual handling.
- The organization satisfied their legal requirements and this helps to prevent compensation claims.
- The employer is seen to be protecting the workforce from injuries.
- The organization saves valuable time and money as employees can be trained on site as and when required.

As a result of this initiative, the training manager has been provided with a model for future training initiatives. It has also helped her to develop a relationship with factory staff which will encourage dialogue at all levels on the needs and benefits of training.

This course has been of enormous benefit for the trainee. Since adopting a training role, she has developed in confidence and has gained the trust and co-operation at all levels. Her initial fears about training superiors and peers proved to be unfounded.

31

7. TAWNAGH SEAFOODS

2.

Background

Tawnagh Seafoods is the trading name of Tawnagh Ltd., a fish processing company located in the scenic rural village of Dunmore East, Co. Waterford. It was established in 1985 and currently employs 16 people on a full-time basis and up to 100 seasonal workers. Tawnagh Seafoods is typical of companies in this sector in Ireland, where 90% of the companies employ 20 people or less. Off season, Tawnagh employs 18 people while for 4-5 months it employs up to 120. It is also typical of fish processing companies across much of the EC in that it is owner-managed.

Tawnagh Seafoods main product is herring fillet and herring roe. Off season Tawnagh Seafoods employs 16-18 people principally to work in its retail and filleting outlets. However, for at least 5 months of the year, Tawnagh has 120 on its payroll. These people are principally involved in filleting, gutting and packing. The majority of the workforce are drawn from within a 20 mile radius. Women account for over 70% of the staff. This figure is largely due to the belief that women have greater dexterity which in turn minimizes waste.

Continuing vocational training

Tawnagh Seafoods, because of its size, is not liable for the 1% training levy under the 1967 Industrial Training Act. This effectively means that it has no legal requirement nor any monetary incentive to engage in training. The company works in a limited way with the local training authority (FAS) but since there is no tradition of formal off-the-job training in the fishing industry, the scope of FAS's assistance is limited as most grant-aided training takes place off the job. It is, however, eligible for support under the Training Support Scheme which is administered by FAS.

Tawnagh Seafoods has no written policy on training, though its manager recognizes the need for a well trained and efficient workforce to ensure the profitability of the company.

Tawnagh does not have any specific criteria for assessing workers. Competence broadly encompasses getting a high yield, keeping knives sharp, packing correctly etc. Personal characteristics, however, are deemed equally important. These would include versatility, dependability, ability to get on with others and compliance. Experience is the only form of training which the trainers have.

Tawnagh has found itself in a position where the external demands are putting increased pressure on staff. The company is no longer small enough to enable the owner-manager to train/coach each new recruit. While the current staff are very loyal, the legacy of the recruitment policy means that Tawnagh is faced with the option of either replacing some existing staff or developing their skills. The case study examined one of the first attempts made by the company to upgrade its supervisory staff.

Report on a specific operation

Up to 1991, training to meet legal responsibilities was largely organized within the company with the owner acting as broker between the authorities and the entire workforce. The owner also provided training. This is largely due to the fact that the training traditions of smaller firms have largely been overlooked in the governing assumptions which have guided the development of government training policy, which has put the emphasis on the larger of large employment units. The competitive need for improved quality and the influence of larger customers over the smaller company combined with the "threats" posed by the creation of the Single European Market have been the catalyst for Tawnagh Seafoods to look outside itself for professional development. Of critical importance were the company's needs to adhere to impending regulations from the EC. Scientific knowledge in particular would be an essential requirement.

With the assistance of FAS through the Training Support Scheme, the Certificate in Food Hygiene was identified as the course most likely to meet the needs of the company as they had been identified by the manager. Whilst not specifically focused on the fish processing industry, there was input from B.I.M. which would deal specifically with that sector.

The certificate course in food hygiene was developed by FAS in consultation with a Course Advisory Committee, including representatives from the National Food Centre (including its marine technology division), the Irish Quality Association and University College Cork.

The decision was made to send the operations manager and one supervisor. Neither possess any formal academic or vocational qualifications. This decision marked the first acknowledgement of the fact that not all skills were within the company.

Details of the course

Title: Certificate course in food hygiene.

Objectives:

- To instruct the participants in the principles of good hygiene and quality practices.
- To develop participants to implement, monitor and maintain desired standards in food processing operations.

Target group:

Managers/supervisors who have operational responsibility for quality/hygiene at levels in their companies.

Course content:

Topics covered included:

Food packaging.
Consumer/retail pressures.
Food hygiene legislation.
Environmental control.
Food premises constriction/layout.
Pest control.
Cleaning.
Basic microbiology.
Good manufacturing practice.
Hygiene auditing.
Food preservation/storage.

Quality assurance ISO 9000 and the food industry.
Quality assurance: documenting quality management systems.
Supervising/motivating for training.
Operator training.

This course is approved by the City and Guilds of London Institute.

Noteworthy features
For both employees concerned, this was the first formal off-the-job training which they received. End of course reactions were very positive and both reached certification standard.

To capitalize on the learning, both participants gave informal presentations to both management and staff on the implications of their learning for the company. A number of changes have been made including changes to the cleaning routine. Changes were made in the structure of jobs. This has also increased motivation of staff since specific responsibilities have increased pride in the job being performed.
This course has relieved the scepticism of the benefits of institutional involvement. It has also provided a framework which will enable the company to assess its future training needs in the area of hygiene and quality. Tawnagh plans to provide all its supervisors with this training before the end of 1993.

Since the course is certificated by a recognized examination body it would enable the holder to transfer. It is highly regarded within the industry. Its foundation level achieves the aim of enabling individuals and companies to approach this difficult area without fear.
This course has enabled them to place their work in context and see themselves as contributors to an overall strategy. Other employees in the company also benefited because the learning was shared in briefing sessions. In areas such as hygiene and quality, awareness of the issues can contribute to a change in attitudes.

Synthesis
Ireland is a country which has undergone major change in the last two decades both in terms of its population structure and its industrial profile. For instance, concentrating on the food sector alone, it can be seen that while it currently accounts for one third of the sales of Irish manufacturing industry and one fifth of its employment, just ten years ago these figures accounted for 42% and 22% respectively. In the 1960s as much as 35% of the population relied on agriculture for their living. In line with other developing economies, however, there has been a shift towards the manufacturing and service sectors and indeed to other countries. This is the essential background against which any discussion on the development and role of training must take place.

Industrial training, and in particular that supported by the European Social Fund, is a major feature of human resource activity in Ireland and has contributed significantly to economic growth and social progress. An essential thrust of this activity has been the enhancement of the skill, knowledge and attitude of the workforce in order to better equip it to both acquire and only more recently retain employment. Despite this increase, however, a recent survey (FAS/MRBI 1989) showed that the level of formal off-the-job training in Ireland is low by European standards. On an annual basis, about one half of all employees receive some training but only one fifth of them receive any off-the-job training that lasts more than four days. The 20% receiving off-the-job training in Ireland compares with 25–40% in other European countries, for example France and Germany. More detailed comparison is however impossible given that lack of specific figures available by sector within the Member States.

The current research shows that major change is taking place in the human resource development strategies in companies in the food and beverage sector. In particular attention is shifting to the need for employees to personally take responsibility for the success of businesses if the organization is to prosper.

Shifts in employment structure and the depressed economic environment have led to greater variation in forms of employment and work patterns. Largely due to the recession of the 1980s a number of important trends have been identified:

- Reduction in the size of the workforce which has led to an examination of how to make the best use of those employed.
- High unemployment with unions and employees more concerned and prepared to consider different ways of working in order to retain jobs.
- The creation of a pool of unemployed people prepared to do marginal work such as part time and temporary work.
- Change in company philosophy as evidenced by an increased concentration on the core activities and skills and a willingness to let others provide periphery services in order to increase flexibility.
- Increased competition from abroad, which has led many to learn from the work patterns of their competitors.
- A marked increase in the numbers of women entering the workplace.

A large number of deep-seated structural explanations have been advanced to explain what appears at first glance (FAS/MRBI 1991) to be our poor performance in training and development. For the food industry in particular, recent trends have influenced or impeded the adoption of employee-centred policies. Dominant among these has been the strategy of growth and profitability through a cycle of take-overs and overseas acquisitions. This is also often coupled with divestment of those parts of the company which no longer fit the approved product mix or which fail to return a profit. The rise of the Plc. in our food industry, which is epitomized by the devel-

33

opment of Avonmore, exemplifies this trend. By following a strategy of growth through acquisition, companies can buy their workforces pre-trained.

Apparent in this study, however, is the fact that training has taken on a greatly expanded meaning in Ireland in recent years. Its scope goes far beyond the traditional notion of teaching a particular physical skill (e.g. machine operator) or an area of technical knowledge (e.g. an organization's operating procedure. While job-based skill remains an important area of training (especially in programmes for the unemployed) one of the largest growing functions of training and development has been in the area of human resource development programmes that attempt to improve interpersonal behaviour at work. This expanded development has not been accommodated in statistics on training. Added to these problems of definition is our failure to evolve and maintain a coherent national system of vocational education and training. In a situation where there is little legal imperative on employers to train, a policy of recruiting skilled labours rather than developing it internally is an economic strategy for individual companies. The threat of seeing skilled labour poached creates a further disincentive.

PART 3:

Main report findings

Conclusion

Appendix 1

Appendix 2

BEST COPY AVAILABLE

MAIN REPORT FINDINGS

3.

1. Characteristics of the Irish food and beverage industry

The food and beverage industry is of overwhelming strategic importance to the Irish economy. It is also one of the fastest changing sectors. Some of the main features of this largely indigenous industry in recent years include:

- Globalization
- Large and accelarating capital outlay – particularly evident in both the dairying and brewing industries
- Company consolidation – the number of companies has decreased dramatically in recent years due largely to continuing merger and acquisition activity.
- Added value product – the food industry in particular has moved increasingly away from intervention support and has concentrated mainly on secondary processing activities
- Enhanced quality demand – due mainly to increased customer choice and ever exacting legal requirements
- Rapid and continuous technological change
- Increased overseas operations

2. Training implications

As the industry changes so too does the skill profile of its workforce. We can identify from both the sectoral survey and the case studies a number of challenges which face the HRD specialist of the food and beverage industry. These include at all levels:

A continuous training requirement

Higher entry level knowledge base

A customized approach to meet company needs

The certification of in-company training

The production of transferable skills

A public and private sector partnership role

3. The training experience

The five case studies suggest that in terms of their human resource development policies and practices, Irish companies emerge as World Class players. The companies studied can be seen to be energetic, creative and determined in their approach to developing their personnel for both present and future requirements. We have seen that good training practice is possible at all levels, from SMEs to multi-nationals. Training has become in many cases a group responsibility as is evidenced by the workers councils in both Poldys Fresh Foods and AGS(D). Many companies have increasingly brought their training in-house. This move has proved to be very effective in terms of increased learning and has been shown to be very cost effective. As the industry develops we can see an expanding role for training as a strategic tool. Some of the reasons for this increased investment in training as stated by the companies include:

improved quality

reduced cost (less wastage)

a highly skilled workforce provides a competitive edge as can be seen, for example, by increased sales

The main points that can be extracted from the case-studies are:

- Enhanced emphasis on social and communication skills for all levels
- Development of in-house consultative systems
- Training is increasingly technologically driven
- Need for locally delivered but nationally recognized training

General

Any discussion on the role of training in the Irish food and beverage industry must focus on the small to medium-sized enterprise. This type of enterprise accounts for over 95% of industry in Ireland and completely encompasses the fishing industry. In organizing their training, small firms such as Tawnagh encounter difficulties in three main areas:

- Resourcing their training effort.
- Finding suitable training for their needs (both in terms of location and content).
- Managing their training effort effectively, including determining needs and assessing its effectiveness.

For many small businesses, the criteria used to define training is sometimes inappropriate. Most definitions of training rely on elaborate use of the systematic training model. This excludes informal guidance and learning by experience. Many small businesses are excluded from grant aid for training because they do not have the appropriate administration. Many also do not have the accounting systems required, and see existing certification courses on offer as too general for their specific needs.

The most significant and exciting developments in recent years have been the increased support available to SMEs from the Industrial Training Authority (FAS). In order to encourage a greater level of continuing vocational training of small and medium-sized enterprises, FAS introduced the Training Support Scheme in 1990. Under this scheme, firms may avail themselves of a number of different forms of assistance ranging from direct training to financial grants. This type of assistance has been very positively received as is evidenced by the cases in this study (Tawnagh, Poldys Fresh Foods and Galtee Foods). It represented a change in policy which throughout the 60s–80s has put emphasis on formal

off-the-job training which had to a large extent excluded this growing SME sector.

Whilst the T.S.S. has proved invaluable to many of the companies interviewed, the pre-condition that the training be certificated can limit its applicability when the bulk of the training required is in the area of communication and interpersonal skills, which have yet to be accredited as legitimate vocational skills.

Coupled with the increasing awareness of the importance of SMEs are the increased demands faced by Irish business because of our open economy. Ireland's exports per capita currently exceed those of Japan. To remain competitive, Irish businesses have had to develop world class management practices including T.Q.M. (more specifically ISO 9000) and J.I.T. There is mounting evidence to suggest that these business practices succeed only to the extent to which employees are fully involved and require effective personnel policies in the areas of communications, involvement recognition and employee development. Steps must be taken to integrate this traditionally non-vocational training into our national support framework for small businesses and beyond.

The role of the social partners has also been significant in the development of training. Despite a decline in union membership (currently around 50%), the 1980s saw the development of a new model of industrial relations. There has been a shift away from the traditional adversarial understanding to a much more collaborative one. This is symbolized mainly by the Programme for Economic and Social Progress (PESP) agreed in 1991. This brought together the social partners, government, employers, farmers and trade unions, to work together in a national partnership in which pay moderation and industrial peace has been exchanged for the promise of initiatives, both to tackle the unemployment problem and maintain existing employment. This working together is an example of a new consensus style of people management which is also to be found at local level in many traditional and newly developed businesses.

Also significant in the emerging role of the trade unions is the notion of the Plant Person. This has arisen from the increased emphasis on greatly enhanced technical and interpersonal skills and the shift away from manual work. The needs of this worker are different from the traditional labourer who was often at the best seen as needing protection and guidance. This change has come about very recently and with it radical changes in emerging organizational arrangements.

The primary means whereby the social partners, that is employers' organizations, trades unions and government, work together on decision making with reference to employment and training is via the Industrial Training Committee for the Food and Drink industry. This committee which is still evolving would appear to play a vital connecting role between industry, the social partners and the authority.

Even though union membership may be on the decline, the unions have continued to influence employee development matters even beyond those companies in which they have actual recognition.

This has been effected by means such as endorsing training in support of legislation as was the case with the Manual Handling Instructors Course participated in by Poldys Fresh Foods – a non-unionized company.

The food industry in Ireland has undergone and continues to undergo rapid change. This has been facilitated mainly by the change in the educational level of the work force. Recent evidence shows that between 1964 and 1988, there has been a 270.6% increase in the number of people in education in Ireland (17,000 in 1964 – 63,000 in 1988). Employee recruitment had historically tended to be at Inter or Group Cert level (i.e. 16yrs), into general operative positions. It has become more common to recruit those who have successfully completed a second level education at this entry level. The move towards increased specialization and the rapid pace of technological growth, combined with the increased availability of more highly educated recruits has resulted in a trend towards employment of those with relevant third level qualifications in preference to recruitment of school leavers.

All of the changes highlight the need for organizations to acquire one asset above all else – high calibre people. Some of the characteristics which the employee of the future will possess include:

- A high level of education possibly up to degree/diploma level. This education will have to cover both technical skills and broader business issues because employees will be required to operate new technology, understand their role in the wider organization context and be capable of taking decisions on their own.
- An ability to learn new skills and continually adapt to changing circumstances. This will require the individual taking responsibility for their own development, learning new processes and keeping skills up-to-date.
- An ability to work without supervision including the self-monitoring of performance.
- An emphasis on interpersonal skills in order to facilitate the management of the internal and external customer interface.
- An ability to solve problems and think creatively about future possibilities and contribute to change in the organization. (Garavan 1993)

From the current research and evidence from other recent Irish reports (e.g. Tansey and Roche 1991), there is evidence to support the notion of emerging trends in industrial training. Most notable among these are:

- A trend towards a focus on improved performance rather than increased individual knowledge.

- A trend towards building up in-house expertise rather dependence on outside expertise.

- A trend towards evaluation of training rather than accepting it on faith (this is especially true of larger companies).

- A trend towards recognizing training as a method of securing the workforce.

Increasing coherence in the Single European Market will further emphasize the need for a highly skilled and flexible workforce. If Ireland is to compete successfully, a number of changes will need to be made to our institutional framework to cope with the inevitable demand for –

- Training leading to recognized standards and vocational qualifications as a necessary guarantee of product and service quality.

  Up to very recently, no overall strategy existed in the area of certification. Whilst the National Council for Education Awards looked after the needs of educational institutions, it did not concern itself with work-based training. The recently proposed National Training Council aims to develop and expand the range of vocational qualifications and also to provide for work-based qualifications. This still raises the question of over what time span.

- Vocational training linked to jobs.

  This will facilitate the very obvious need to match emerging job demands with their linked technical and interpersonal skill requirements.

- Agreed policy on assessment and certification.

As FAS continues to serve the needs of industry through its Services to Industry section, it will need to address industry demands for 'softer' training. This can be done by ensuring, as has occurred throughout its history, ever closer communication links between all the players in the food and beverage sector. We can see from the statistics that 9% of the FAS budget which has been allocated to in-company training accounts for 37% of throughput. This represents a highly efficient use of funding and defines the leverage role of FAS. It also points to the fact that industry has begun to adopt a more proactive approach to training.

The definition of what constitutes training needs to be expanded to take account of the particular needs of the rapidly increasing small business sector. The existing levy system may need to be evaluated. It has, throughout the years, provided a channel of communication about the trends in industry but, because of the terms of the 1967 Industrial Training Act, training support has been very specific in its orientation. Due to rapid change in the industry and the increasing level of competence of our workforce, what is needed is a much more collaborative and supportive resource structure. In spite of the evidence presented by the FAS/MRBI 1989 survey, there is evidence to suggest that companies have become more aware of their own responsibilities vis-a-vis training and developing their workforce.

Training delivery methods also need critical examination. For example, the geographical location of many food companies means that travel and subsistence costs alone prohibit participation in many programmes. This is particularly the case for women, many of whom are employed on a part-time basis and carry a heavy responsibility for dependants. To reach these and all such needs, further work needs to be carried out on evaluating the use of multimedia and distance learning methods, such as cable TV and CAD/CAM, the capability of which have greatly improved as the overall costs have plummeted.

In Ireland the context of training and development is in a state of continual flux as it tries to adapt to constant change in areas such as technology, economics and culture. Training, as evidenced by this study, must now change from adapting a reactive stance to being more proactive in dealing with performance problems. It also must continue to develop as a key issue in the development of business strategy.

These developments have, of course, implications for the training and development specialist in the organization. Attention needs to be given to both the development of trainers and their role in the organization. The National Institute of Trainers could perhaps, in consultation with industry, develop standards for trainers. Although in recent years educational establishments such as University College Cork have provided training and development courses, much work needs to be done on the development of the in-house trainer. The transformation from a traditional training and development model to a learning model requires that the role of the training specialist will be concerned mainly with promoting realistic approaches to learning and the identification of different learning processes in the organization. To make any significant differences, training specialists will need to reach board level.

CONCLUSION

3.

Within the food and drinks industry, there is evidence of an impressive commitment to training which is on a par with training in other EC countries, and this is continuing to grow.

Continuing training raises acute questions of boundary management as between the private and public sectors. In general, the role of FAS has been one of a facilitator rather than a direct provider of training. Firms in the food and drink industries view their needs as being highly customized and the large firms have developed their own internal training programmes to keep pace with technological changes and to sharpen competitiveness. Currently the relative inputs have led to a situation where best practice is seen as keeping training internal – company employees are trained to train company employees, with public sector support being available as training grants from FAS acting as training catalysts. There is now a need to globalize training.

APPENDIX 1

3.

Aims and objectives

- The survey is to have an essentially demonstrative character and is intended to identify, analyze and publicize the most exemplary and significant practices found in continuing training provided in companies or by third parties on a company's behalf.
- The survey should contribute towards promoting co-operation between companies with different levels of access, investment and provision in terms of continuing training, a principal objective of the FORCE programme.
- The survey should contribute to the European dialogue on achievements and training requirements in the food and beverage sector.
- Significant practices identified will be analyzed in a manner which makes them optimally applicable elsewhere.
- It should form a frame of reference to analyze and to compare recent trends in other EC countries.

APPENDIX 2

3.

Research methodology
The proposal and outline which was developed by the FORCE committee and further refined by Crege Management (managing partners of this pan-European study) provided for four operational phases:

advance analysis of the sectoral context

selection of cases to be covered by the survey

the survey proper

analysis and exploitation of the results

1. Advance analysis of the sectoral context
The purpose of the sectoral survey was to supply information which is essential to fully understanding the subsequent analysis of training.

Examples of topics included: delimitation of the sector; factors of change; demographic development; technology; socio-institutional context and the role of the social partners; training provision for the sector.

2. Selection of the case studies
Appendix 1 contains an outline of the pre-selection questionnaire.

Appendix 2 contains a list of the fifty companies selected accross Europe.

3. The survey proper
The case study method was selected for this particular research.

A case study is an empirical enquiry that:

- investigates a contemporary phenomenon within its real life context; when the boundaries between the phenomenon and context are not clearly evident; and in which multiple sources of evidence are used

The survey was carried out by an interviewer on the basis of semi-structured questions and involved at least four categories of interviewee:

- owners/managers
- company management staff
- training personnel or external training agents
- the staff involved in the training scheme and their representatives (depending on the social context)

The interview addressed the following aspects (their respective importance depending on the nature of the innovation):

- The company within which the training scheme is being carried out: its products, markets, structure, strategy, manpower structure, etc.
- The training strategy and its objectives
  relationship between the training strategy of the enterprise and that of national authorities.

  relationship between the general strategy of the enterprise and more particularly the employment and training strategy, e.g. training to improve quality

  specificity of the company's training strategy vis-à-vis the sector

  target group
- The role of the social partners in defining the training objectives, plans and programmes
- Organization of training:

  internal/external provision

  responsibilities for training

  training policy
- Training content and methodology
- Costs and funding
- Results and evaluation on the basis of corporate and trainee expectations

General
The actual target of the surveys would most often be a plant. The assessment of the training policies by the various actors is of paramount importance to this study. Each case-study therefore, when relevant, includes a section in which the positions of the management and the employees representative bodies are clearly stated, in particular their evaluation of:

- the policy making procedures
- the management of the project
- the form of association between the initiators of the project
- the degree of transferability of the training practices.

4. Exploitation of the results
This will take place at two levels:

- national and
- European

It will include
- Summary of the main findings
- Analysis and conclusion

CEDEFOP – European Centre for the Development of Vocational Training

Training in the food and beverages sector in Ireland

Deirdre Hunt, Michael O'Suilleabhain, Mary Ward

Luxembourg: Office for Official Publications of the European Communities

1994 – 40 pp. – 21.0 x 29.7 cm

ISBN 92-826-8316-8

Price (excluding VAT) in Luxembourg: ECU 5.50

Venta y suscripciones • Salg og abonnement • Verkauf und Abonnement • Πωλήσεις και συνδρομές
Sales and subscriptions • Vente et abonnements • Vendita e abbonamenti
Verkoop en abonnementen • Venda e assinaturas

BELGIQUE / BELGIË

Moniteur belge /
Belgisch staatsblad
Rue de Louvain 42 / Leuvenseweg 42
1000 Bruxelles / 1000 Brussel
Tél. (02) 512 00 26
Fax (02) 511 01 84

Jean De Lannoy
Avenue du Roi 202 / Koningslaan 202
1060 Bruxelles / 1060 Brussel
Tél. (02) 538 51 69
Telex 63220 UNBOOK B
Fax (02) 538 08 41

Autres distributeurs/
Overige verkooppunten

Librairie européenne/
Europese boekhandel
Rue de la Loi 244/Wetstraat 244
1040 Bruxelles / 1040 Brussel
Tél. (02) 231 04 35
Fax (02) 735 08 60

Document delivery:
Credoc
Rue de la Montagne 34 / Bergstraat 34
Bte 11 / Bus 11
1000 Bruxelles / 1000 Brussel
Tél. (02) 511 69 41
Fax (02) 513 31 95

DANMARK

J. H. Schultz Information A/S
Herstedvang 10-12
2620 Albertslund
Tlf. 43 63 23 00
Fax (Salg): 43 63 19 69
Fax (Management): 43 63 19 49

DEUTSCHLAND

Bundesanzeiger Verlag
Breite Straße 78-80
Postfach 10 05 34
50445 Köln
Tel. (02 21) 20 29-0
Telex ANZEIGER BONN 8 882 595
Fax 202 92 78

GREECE/ΕΛΛΑΔΑ

G.C. Eleftheroudakis SA
International Bookstore
Nikis Street 4
10563 Athens
Tel. (01) 322 63 23
Telex 219410 ELEF
Fax 323 98 21

ESPAÑA

Boletín Oficial del Estado
Trafalgar, 27-29
28071 Madrid
Tel. (91) 538 22 95
Fax (91) 538 23 49

Mundi-Prensa Libros, SA
Castelló, 37
28001 Madrid
Tel. (91) 431 33 99 (Libros)
431 32 22 (Suscripciones)
435 36 37 (Dirección)
Telex 49370-MPLI-E
Fax (91) 575 39 98

Sucursal:
Librería Internacional AEDOS
Consejo de Ciento, 391
08009 Barcelona
Tel. (93) 488 34 92
Fax (93) 487 76 59

Llibreria de la Generalitat
de Catalunya
Rambla dels Estudis, 118 (Palau Moja)
08002 Barcelona
Tel. (93) 302 68 35
Tel. (93) 302 64 62
Fax (93) 302 12 99

FRANCE

Journal officiel
Service des publications
des Communautés européennes
26, rue Desaix
75727 Paris Cedex 15
Tél. (1) 40 58 77 01/31
Fax (1) 40 58 77 00

IRELAND

Government Supplies Agency
4-5 Harcourt Road
Dublin 2
Tel. (1) 66 13 111
Fax (1) 47 80 645

ITALIA

Licosa SpA
Via Duca di Calabria 1/1
Casella postale 552
50125 Firenze
Tel. (055) 64 54 15
Fax 64 12 57
Telex 570466 LICOSA I

GRAND-DUCHÉ DE LUXEMBOURG

Messageries du livre
5, rue Raiffeisen
2411 Luxembourg
Tél. 40 10 20
Fax 49 06 61

NEDERLAND

SDU Overheidsinformatie
Externe Fondsen
Postbus 20014
2500 EA 's-Gravenhage
Tel. (070) 37 89 880
Fax (070) 37 89 783

PORTUGAL

Imprensa Nacional
Casa da Moeda, EP
Rua D. Francisco Manuel de Melo, 5
1092 Lisboa Codex
Tel. (01) 69 34 14
Fax (01) 69 31 66

Distribuidora de Livros
Bertrand, Ld.ª
Grupo Bertrand, SA
Rua das Terras dos Vales, 4-A
Apartado 37
2700 Amadora Codex
Tel. (01) 49 59 050
Telex 15798 BERDIS
Fax 49 60 255

UNITED KINGDOM

HMSO Books (Agency section)
HMSO Publications Centre
51 Nine Elms Lane
London SW8 5DR
Tel. (071) 873 9090
Fax 873 8463
Telex 29 71 138

ÖSTERREICH

Manz'sche Verlags-
und Universitätsbuchhandlung
Kohlmarkt 16
1014 Wien
Tel. (1) 531 610
Telex 112 500 BOX A
Fax (1) 531 61-181

SUOMI/FINLAND

Akateeminen Kirjakauppa
Keskuskatu 1
PO Box 218
00381 Helsinki
Tel. (0) 121 41
Fax (0) 121 44 41

NORGE

Narvesen Info Center
Bertrand Narvesens vei 2
PO Box 6125 Etterstad
0602 Oslo 6
Tel. (22) 57 33 00
Telex 79668 NIC N
Fax (22) 68 19 01

SVERIGE

BTJ AB
Traktorvägen 13
22100 Lund
Tel. (046) 18 00 00
Fax (046) 18 01 25
30 79 47

ICELAND

BOKABUD
LARUSAR BLÖNDAL
Skólavördustig, 2
101 Reykjavik
Tel. 11 56 50
Fax 12 55 60

SCHWEIZ / SUISSE / SVIZZERA

OSEC
Stampfenbachstraße 85
8035 Zürich
Tel. (01) 365 54 49
Fax (01) 365 54 11

BÁLGARIJA

Europress Klassica BK
Ltd
66, bd Vitosha
1463 Sofia
Tel./Fax 2 52 74 75

ČESKÁ REPUBLIKA

NIS ČR
Havelkova 22
130 00 Praha 3
Tel. (2) 24 22 94 33
Fax (2) 24 22 14 84

MAGYARORSZÁG

Euro-info-Service
Honvéd Europa Ház
Margitsziget
1138 Budapest
Tel./Fax 1 111 60 61
1 111 62 16

POLSKA

Business Foundation
ul. Krucza 38/42
00-512 Warszawa
Tel. (2) 621 99 93, 628-28-82
International Fax&Phone
(0-39) 12-00-77

ROMÂNIA

Euromedia
65, Strada Dionisie Lupu
70184 Bucuresti
Tel./Fax 0 12 96 46

RUSSIA

CCEC
9 60-letiya Oktyabrya Avenue
117312 Moscow
Tel./Fax (095) 135 52 27

SLOVAKIA

Slovak Technical
Library
Nám. slobody 19
812 23 Bratislava 1
Tel. (7) 220 452
Fax (7) 295 785

CYPRUS

Cyprus Chamber of Commerce and
Industry
Chamber Building
38 Grivas Dhigenis Ave
3 Deligeorgis Street
PO Box 1455
Nicosia
Tel. (2) 449500/462312
Fax (2) 458630

MALTA

Miller distributors Ltd
PO Box 25
Malta International Airport
LQA 05 Malta
Tel. 66 44 88
Fax 67 67 99

TÜRKIYE

Pres Gazete Kitap Dergi
Pazarlama Dagitim Ticaret ve sanayi
AŞ
Narlabahçe Sokak N. 15
Istanbul-Cagaloglu
Tel. (1) 520 92 96 - 528 55 66
Fax 520 64 57
Telex 23822 DBVO-TR

ISRAEL

ROY International
PO Box 13056
41 Mishmar Hayarden Street
Tel Aviv 61130
Tel. 3 496 108
Fax 3 648 60 39

EGYPT/
MIDDLE EAST

Middle East Observer
41 Sherif St
Cairo
Telex 39 39 732

UNITED STATES OF AMERICA /
CANADA

UNIPUB
4611-F Assembly Drive
Lanham, MD 20706-4391
Tel. Toll Free (800) 274 4888
Fax (301) 459 0056

CANADA

Subscriptions only
Uniquement abonnements

Renouf Publishing Co. Ltd
1294 Algoma Road
Ottawa, Ontario K1B 3W8
Tel. (613) 741 43 33
Fax (613) 741 54 39
Telex 0534783

AUSTRALIA

Hunter Publications
58A Gipps Street
Collingwood
Victoria 3066
Tel. (3) 417 5361
Fax (3) 419 7154

JAPAN

Kinokuniya Company Ltd
17-7 Shinjuku 3-Chome
Shinjuku-ku
Tokyo 160-91
Tel. (03) 3439-0121

Journal Department
PO Box 55 Chitose
Tokyo 156
Tel. (03) 3439-0124

SOUTH-EAST ASIA

Legal Library Services Ltd
Orchard
PO Box 0523
Singapore 9123
Tel. 73 04 24 1
Fax 24 32 47 9

SOUTH AFRICA

Safto
5th Floor, Export House
Cnr Maude & West Streets
Sandton 2146
Tel. (011) 883-3737
Fax (011) 883-6569

AUTRES PAYS
OTHER COUNTRIES
ANDERE LÄNDER

Office des publications officielles
des Communautés européennes
2, rue Mercier
2985 Luxembourg
Tél. 499 28 1
Telex PUBOF LU 1324 b
Fax 48 85 73/48 68 17

BEST COPY AVAILABLE

European Centre for the Development of Vocational Training
Jean Monnet House, Bundesallee 22, **D-10717 Berlin**
Tel: 49-30+88 41 20; Fax: 49-30+88 41 22 22; Telex: 184 163 eucen d

CEDEFOP

04 05 16

HX-83-94-216-EN-C

Price (excluding VAT) in Luxembourg: ECU 5.50

ISBN 92-826-8316-8

OFFICE FOR OFFICIAL PUBLICATIONS
OF THE EUROPEAN COMMUNITIES
L-2985 Luxembourg

BEST COPY AVAILABLE